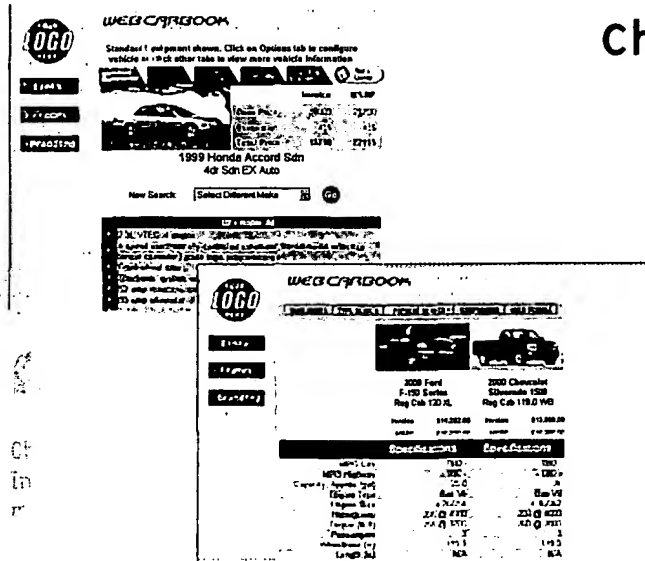


CHROME.COM™

Auto Lending at Net Speed

Auto Lending at Net Speed

Chrome Data Corporation's Chrome.com gives your institution the e-commerce tools to capture automotive financing from web savvy members. Integrating Chrome.com into your current Web site offers your members new and valuable services. These services help to strengthen member relationships and give you control over the auto buying experience.



Chrome.com offers the following :

Research and Ordering Tools

Web Carbook™ provides the automotive industry with the most complete and accurate vehicle service on the Internet. Web Carbook enables your members to configure and price any vehicle with confidence that the vehicle is orderable.

Communication Tools

Quote Center™ takes the request for quote on the member's selected vehicle and sends it, electronically, to be processed by any of the following you choose:

- Your in-house auto advisor
- Dealers in your indirect auto loan program
- Outside auto consultant company

How it Works

Your members access Web Carbook through your Web site to research and price their new vehicle. The selection is then transmitted to Chrome.com's Quote Center to send to selected dealers. You control which dealerships will be selected to receive the member's Request for Quotation. These dealerships will receive electronic notification of the vehicle request and an Internet Quote Response Form. They will fill these forms out and send it back to you. You compare the prices and present the member with the best deal. The winning dealer is notified and vehicle closing and financing is then arranged with the selected dealership. You hand your member a check, and they are off to the dealership financed and ready to buy.

Your Own Branding with Absolute Flexibility

Chrome.com is an Internet application, allowing easy set-up and integration into your current Web site. Chrome.com works seamlessly within your current Web site design allowing you to utilize your branding while keeping members on your site. There are no advertising banners and no outside weblinks.

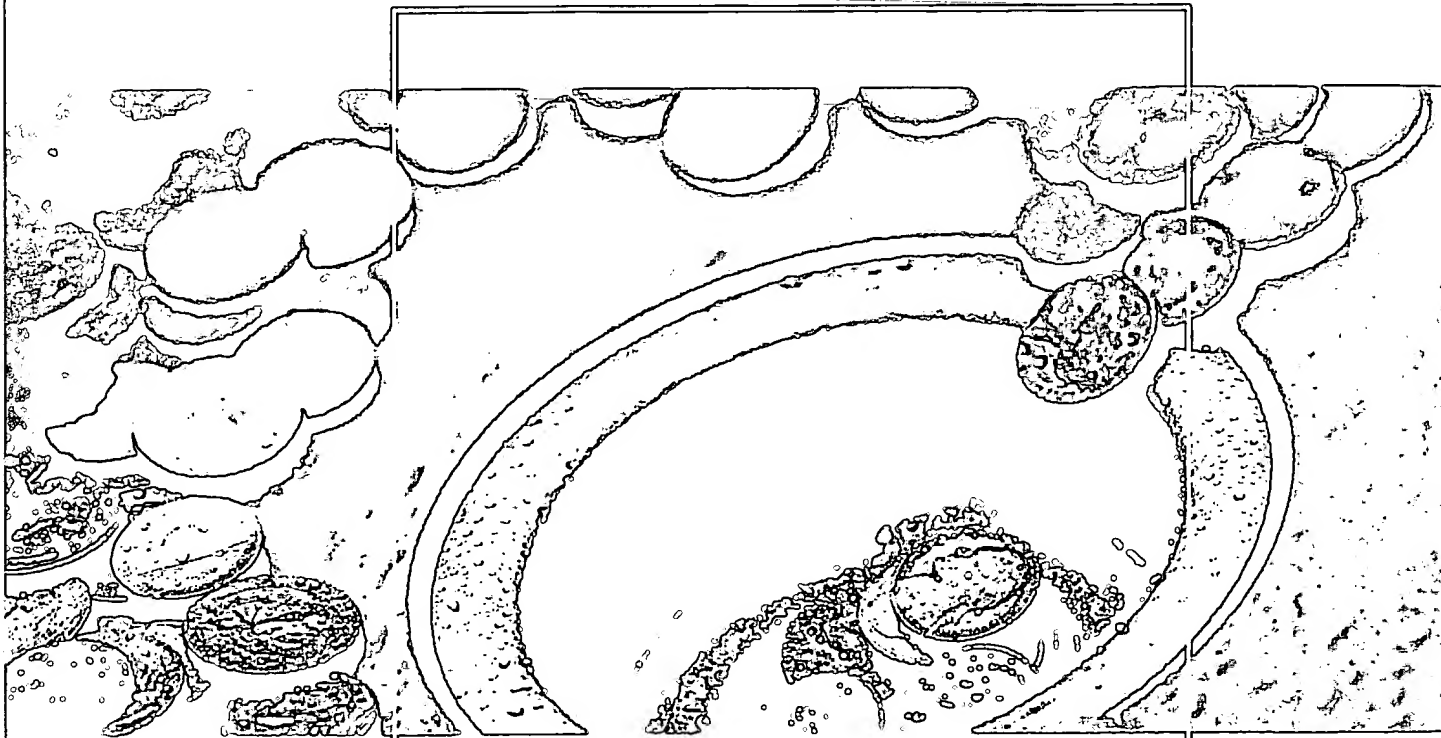
BEST AVAILABLE COPY

CHROME DATA CORPORATION

www.chromedata.com

(800) 936-8904

© 1999 Chrome Data Corporation 11/12 CREDPROD



**CAPTURE AUTOMOTIVE E-COMMERCE
BUSINESS WITH CHROME.COM**

Chrome.com is the service that gets you there! It's the revolutionary Internet car market that connects buyers and sellers.

Vehicle transactions are complicated and positioning is everything. To capture your share of the business related to a new vehicle purchase, you need to be positioned squarely at the point of sale.



Driving the power of the Internet to work for you

By the year 2000, 50% of consumers will use the Internet for researching and buying new vehicles.

For consumers: Online auto-buying assistance is the hottest thing going. Nearly 40% of new vehicle buyers use the Internet today to obtain vehicle product and pricing information. And by the year 2000, more than half of all consumers will use the Internet in their car-buying process. The reason for the growth is simple: information gives consumers control of the buying process. They get better prices and a more satisfying experience.

For automotive suppliers: When you offer online auto-buying assistance, you put your organization squarely at the point of sale. You'll be in a perfect position to capture a greater share of car deals.

Use Chrome.com to give your consumer the best deal on a new car.

CHROME.COM GIVES YOU:

PROVEN WEB-BASED TECHNOLOGY

Web Carbook™ Internet vehicle research.

Quote Center™ Sending and receiving vehicle Quote Requests and Responses.

THE WORLD'S BEST DATA

Chrome Data pioneered electronic vehicle configuration. It's the data the dealers rely on and the preferred choice of thousands of automotive professionals worldwide.

ABSOLUTE FLEXIBILITY

Because Chrome.com is an Internet application, it's easy to set-up and integrate into your Internet program.

YOUR OWN BRANDING

As far as your consumer is concerned, they're working with your organization. Chrome.com contains no advertising, no links, and no products and services that compete with yours.

With our tools & your branding...

Chrome.com is your complete online auto-buying assistance center.

HERE'S HOW CHROME.COM WORKS....



Consumers access Web Carbook to research and price their new vehicle. By clicking "Get A Quote," their vehicle selection is transmitted to Chrome.com's Quote Center™ to be forwarded to auto dealers.



From Quote Center, dealerships receive the vehicle Quote Request. Dealers receive an electronic notification of the vehicle request.



Quotes from responding dealers are received and compared. The consumer selects the vehicle that best meets their criteria, and the successful dealer is notified.



Vehicle closing is arranged with the successful dealership.

About Chrome Data

Chrome Data Corporation... the most respected name in professional vehicle data, has been delivering powerful information tools to the automotive industry since 1986. We pioneered electronic vehicle configuration and for the past 12 years, our commitment to deliver the most comprehensive and accurate vehicle data has made us the standard by which all others are measured.

Our customer list says it all - more than 5,600 dealer franchises and over 2,700 credit unions, banks, fleet administrators, auto brokers, and fleet leasing companies rely on our vehicle data every business day.

For more information, visit:

www.chrome.com

CHROME DATA
CORPORATION

800-936-8904

sales@chrome.com

Microsoft Certified
Business Provider

PP 23 082599
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CHROME.COM™

Defining | The Electronic Car Market

Chrome Data Corporation

Putting the power of the Internet to work for you.

Chrome.com is the revolutionary new, business to business electronic car market that connects buyers and sellers through *your* auto-buying assistance program.

With Chrome.com, dealers *compete* for your consumers' vehicle purchase because they know you represent informed and qualified buyers, not just tire-kickers. Your consumers get the lowest price possible on the exact vehicle they want, and you get their loyalty.

Chrome.com gives you the tools to compete

The impact of the Internet on the way people shop for and buy vehicles has exceeded every prediction. By the year 2000, experts predict that over half of all consumers will use the Internet in their car-buying process!

The rapidly expanding number of web sites currently offering automotive information, are using it to promote products and services that compete directly with yours. With Chrome.com, you *stop* losing business on the Internet because you're there at the point of purchase, controlling the buying process from start to finish.

Chrome.com's complete auto-buying assistance program is everything your organization needs to compete and succeed on the Internet.

Here's how Chrome.com works....



To assist with initial vehicle research, consumers with Internet access connect to Web Carbook™ through *your* web site. Their vehicle selection is then transmitted to your Chrome.com auto-buying assistance center.



For consumers without Internet access, Chrome.com uses PC-Carbook® at your auto-buying assistance center to determine their vehicle requirements. Chrome.com then generates a detailed vehicle quote request to send electronically to selected dealers.



From a list of all new car dealers in the country, you select the dealerships qualified to receive the vehicle quote request. Dealers receive an electronic notification of the vehicle request including terms and conditions, the exact vehicle description and an electronic response form.



Vehicle quote responses from dealers are received, compared and reviewed. The winning vehicle response is selected by your consumer.



Vehicle "closing" is arranged with the winning dealership.

**Auto-buying assistance has
never been this easy.**

Everyone Wins with Chrome.com

"For Dealers, it's all about the quality of leads and the cost to generate them. When people are assisted by professional auto-buying programs like Chrome.com, they get the best price, and we move inventory. The Internet is reducing the costs associated with selling cars. Chrome.com will dramatically increase the quality of Internet leads for dealers."

Phil Cash,
Fleet Manager
Phil Long Family of
Dealerships / Value Club
Colorado Springs, CO.

CHROME.COM

Here's what automotive experts are saying about Chrome.com...

"Chrome.com is the most significant development in buyers assistance to come along in the last 20 years. This tool will let me expand and grow my business as fast as I want."

Ron Frey
Executive VP
AutoLand

"Chrome.com is one of the most valuable tools I can think of to help organizations compete with current Internet services. We think Chrome.com represents the future direction of automotive e-commerce."

Bill Batstone
Assistant VP
CUNA Mutual
Insurance Group

"Chrome.com is exactly what the direct leasing market has been waiting for."

Michael Kranitz
President
LeaseSource Online, Inc.

Chrome.com System Requirements

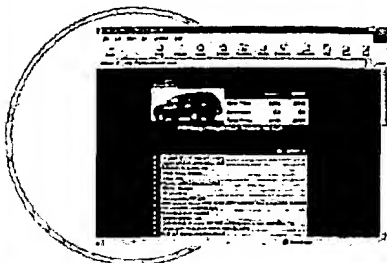
- Pentium 90
- 16 MB RAM
- CD-ROM Drive
- 200 MB available HD space
- Windows 95, 98 or NT 4.0
- 800x600 pixel desktop area
- VGA 256 color monitor
- Internet access

The Complete Auto-Buying Assistance Package

From start to finish, Chrome.com is designed to help your consumers get the exact vehicle they want at the lowest possible price. Our straightforward program walks you through the entire process, from determining vehicle requirements and creating a quote request to analyzing dealer quotes and finalizing the transaction.

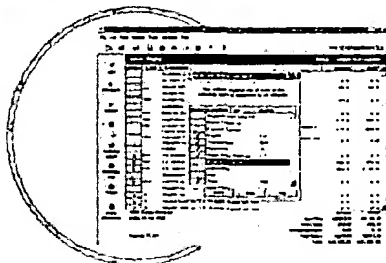
Research and Configure Vehicles

Chrome.com offers your consumers two ways to accurately price and configure vehicles: Web Carbook, for consumers with Internet access and PC Carbook, on your desktop to assist those without Internet access.



Chrome Data's **WEB CARBOOK**

Web Carbook provides a simple, user-friendly web site for your consumers to access new and used vehicle pricing, standard and optional equipment and more. Frame Web Carbook within your web site and your consumers can browse information and choose their vehicle from home. Web Carbook contains no advertising and will not direct consumers to other web sites.



Chrome Data's **PC CARBOOK**

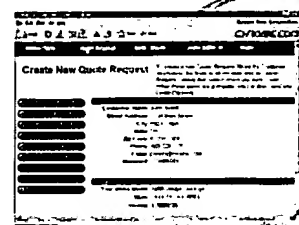
For consumers without Internet access, Chrome.com uses PC Carbook at your auto-buying assistance center to determine your consumers' exact vehicle requirements. For more than 12 years, dealers have relied on PC Carbook to price, spec and order their vehicles, and in Chrome.com, PC Carbook provides common vehicle data to buyers and sellers.

Send and Receive Quotes

Once your consumer's exact vehicle requirements are determined, Chrome.com builds a vehicle quote request to send to selected dealers and helps you organize and review dealer quote responses.

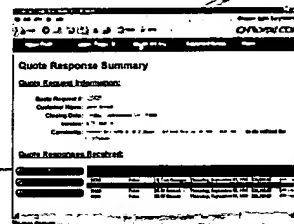
Creating the Quote Request

Chrome.com makes it easy to enter customer information and build a custom dealer list from all dealers in the country. You can even set the response deadline, enter vehicle option priority, and trade-in information.



Reviewing the Quote Responses

Chrome.com lets you view, compare and analyze dealer responses to help you select the best deal for your consumer.



For more information,
visit us on the web at:

www.chrome.com

About Chrome Data

Chrome Data Corporation... the most respected name in professional vehicle data, has been delivering powerful information tools to the automotive industry since 1986. We pioneered the technology behind vehicle configuration and for the past 12 years, our commitment to deliver the most comprehensive and accurate vehicle data has made us the standard by which all others are measured.

Our customer list says it all - more than 5,600 dealer franchises and over 2,700 credit unions, banks, fleet administrators, auto brokers, and fleet leasing companies rely on our vehicle data every business day.

Chrome Data Corporation
524 Main Street
Oregon City, OR 97045

800-936-8904

sales@chrome.com

Microsoft Certified
Solution Provider

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System Overview

Use your existing auto-buying assistance program...

①

Consumers access Web Carbook from your web site to price and spec' their new vehicle. The vehicle file is automatically transmitted to Quote Center.

②

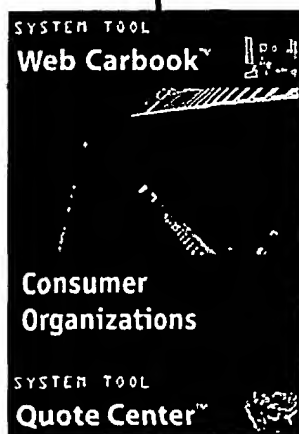
In Quote Center, you select the dealerships to receive the vehicle Quote Request. Selected dealers receive an electronic notification of the vehicle request and an Internet Quote Response form.

③

Vehicle Quote Responses from dealers are received and compared. Your consumer selects the vehicle that best meets their criteria, and the dealer is notified.

④

Vehicle "closing" is arranged with the selected dealership. You hand your consumer a check, and they are off to the dealership financed and ready to buy.



Use a Buyer's Agent to create a new auto-buying assistance program...

①

Consumers access Web Carbook through your web site to price and spec' their new vehicle. This vehicle selection is then transmitted to a third-party Buyer's Agent you contract with to provide auto-buying assistance on behalf of your organization.

②

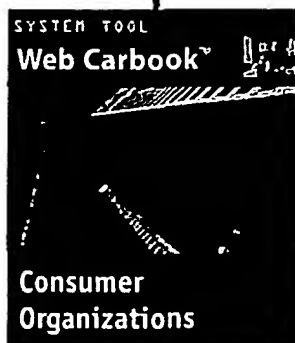
In Quote Center, your Buyer's Agent selects dealerships to receive the vehicle Quote Request. Selected dealers receive an electronic notification of the vehicle request and an Internet Quote Response form.

③

Vehicle Quote Responses from dealers are received and compared. Your consumer selects the vehicle that best meets their criteria, and the dealer is notified.

④

Vehicle "closing" is arranged with the selected dealership. You hand your consumer a check, and they are off to the dealership financed and ready to buy.



User's Guide

CHROME.COM™

Defining | The Electronic Car Market

www.chrome.com

Chrome Data Corporation

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Chrome.com Product Summary

Chrome.com is a multi functional web based program that provides a method to the end user to configure a vehicle, and send the request through Quote Center to dealers for the return of a quote. Once an Affinity or Hub have successfully installed Chrome.com and have made available Web Carbook to their customers, they can begin analyzing and sending their customers requests. The first step in the process for a Chrome.com member would be to log in to Quote Center. To log in, the Chrome.com member would need to enter their Location Name, which is determined by Chrome Data Corp., User Name, pre set by the institutions administrative controller, and Password, also pre set by the institutions administrative controller.

There are four sections to **Quote Center**: Customer Requests, Dealer Responses, History and Admin Tools.

The first section is **Customer Requests**. This section will display the requests entered by the institutions Customer by accessing the institution web site or allow the institution to create a request for their Customer on site. This folder is where the requests are analyzed and then sent to dealers by the Hub. Incoming requests are split into five sections: Customer Info, Vehicle Info, Request Details, Send To and Save or Send. To summarize the Customer Requests section allows you to create, view, edit, or delete requests.

Customer Info will display specific information about the customer, for example Name, Address, Phone, etc. A request can be sent as a Quote Request sending only the vehicle configuration and the Hub or Affinity information to dealers returning an electronic response to the institution. Or the other option is to send the request as a Customer Lead. Sending the customer information with the vehicle configuration at that time the dealers responding to the request would not send an electronic response to Quote Center but would contact the customer directly.

The **Vehicle Info** will display a detailed vehicle spec including Year, Make, Model, Style, Color, options and an options ranking report on the importance of each selection made in regards to the desired vehicle.

The **Quote Request Details** section is where the Request Expiration Date is determined, a comment field is provided to send a personalized message to the dealer, accepting a maximum of 254 characters.

Once the customer, vehicle and request detail information is entered the **Send To** section allows the Hub agent to analyze the request and determine how and where the request is to be sent.

Another option would be the **Save** option. If save is selected the Send To information must be re-entered when the request is sent, by selecting the Save option the request can be edited or deleted at a later time before sending.

If the **Send** option is selected, the customer, vehicle and request detail information must be complete to send the request to Dealers.

Once all the options are determined the request is sent to the dealerships or Auto Advisor dependent if the institution is an Affinity or Hub. At this point the **Dealer Responses** section is the area of focus. This section is where the incoming Dealer Responses are analyzed and acceptances are sent back to the dealer. With an acceptance the customer information can be sent to the dealer, or continue with the Institution information attached. The Dealer Responses section allows you to view a detailed report of the Dealer response and a Comparison report to see what vehicle option requests are met.

After the processed Customer Request and Dealer Response have been accepted, expired or deleted on the Dealer Responses section the records are stored in the **History** folder. The History folder displays a view of 15 records at a time with an option to navigate through the entire list with the use of navigation buttons. The History folder is set to automatically purge records out of the system. There is basic detail information available about the Customer Request information and the Dealer Response information for review in the History folder.

The final segment of Quote Center is **Admin Tools**. The Admin Tools section is split into five sections and used to update your Company Info, User Info, Dealer List and set System Defaults and enter your Customer Request Terms.

The **Company Info** is specific to your Institution, use this to set up, verify and modify your company information. This screen lists your company number, which is a non-editable number generated by Chrome Data Corp. and is used as a verification number, Location Name, Street, City/State, Zip+4, Phone, Fax, Email and URL. The information entered here is how it will appear to the dealerships and Auto Advisors.

The **User Info** section allows you to add, modify or delete system users for your organization. There are two types of user's; Admin and Non-Admin. An Admin user has administrative rights and will have access to make changes to default settings and customer requests. Non-Admin users can not access Admin Tools. There is no limit to the number of users you can enter. To create a new user you must enter the following criteria; First Name, Last Name, Phone, Login Name, Password, Confirm Password, optional criteria is Email, Fax and Admin Rights. As throughout Quote Center an asterisk (*) indicates a required field.

The **Dealer List** section is where you create and modify your Custom Dealer List. Dealers that are added are selected from the Chrome.com National Dealer List. The National Dealer List has approximately 20,000 dealers' nation wide to select from. A search can be done using the following options; Vehicle Line and Zip Code search or City/State search. Search filters can be further defined using the Auto Send function, which will be covered later in this article.

The **System Defaults** segment is where you set the Default Expiration Time Period (days), the number entered here will determine when the customer requests will expire. And the Default Request Type will determine if the request is sent as a Customer Request or a Customer Lead. The last section to System Defaults is the Auto Send section, this function is used to send a Customer Request or Customer Lead automatically to the Auto Advisor or Dealerships, this section will be explained in more detail.

Auto Send is a feature that allows a Hub or Affinity to configure Quote Center to automatically send Quote Requests from customers to dealer (s) that meet specific criteria entered in the Auto Send Setup.

The **Terms** section of Quote Center provides a field to type in your institutions Custom Terms for Quote acceptance with a maximum of 254 characters. Also provided are the Chrome.com Member Terms, which are non-editable.

Chrome.com System Login

To load Chrome.com click the **Chrome.com icon**, on your desktop. Or select it from the Chrome Data Program group, from the Start menu/Program Files/Chrome Data/Chrome.com. Or if installed, load JumpStart and select the Chrome.com icon from JumpStart.

The first screen(s) you will see are Security Alert messages. Select to continue. You will not see the security alert messages if your browser allows you to enter a secured and/or unsecured site with out prompting. This will load the Chrome.com System Login page.

Chrome.com System Login page

File Edit View Help

Back Stop Forward Home Login

CHROME DATA CORPORATION

CHROME.COM
System Login

Location Name:

User Name:

Password:

[Login Trouble?](#)

Welcome to...
Chrome.com | The Electronic Car Market

New Features...

- Easier To Use!
- Faster!
- Deletion and Archiving
- Expanded Functionality for Contacting Chrome
- Expanded Help

CHROME

http://www.chrome.com/authn/login.asp 2:11 PM 10/27/1999

To Login you will need Location Name, User Name, and Password information. To enter your specific institution information, press the <TAB> key or click once in the desired field.

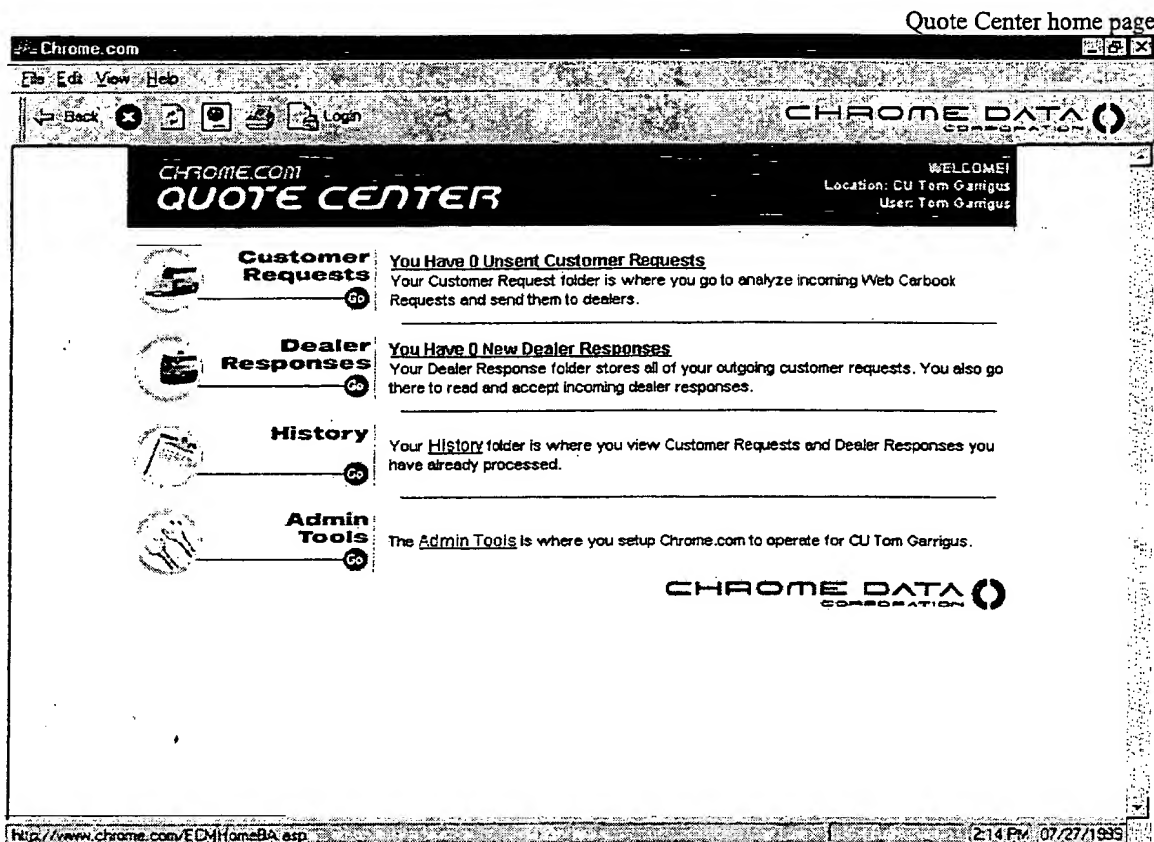
Once the cursor is in the Location Name field, type "Your Assigned Institution Name" press the <TAB> key, this will automatically move you to the next field; User Name, type "Your User Name" press the <TAB> key. The last field is Password, type "Your Password" press the <TAB> key then the <ENTER> key or click the Login button.

You may see a Security Alert message. Select to continue.

Login Trouble? This option can be used if you are having difficulty logging into Chrome.com. This link will take you to a help page and give instructions about what to do *If You Are A Member of Chrome.com* or *If You Are Not A Member of Chrome.com*

Chrome.com Customer Requests

Once you are successfully logged into Quote Center, you will see four options, Customer Request, Dealer Responses, History, and Admin Tools (if logged in with Admin status). The Admin Tools link will not be displayed if a Non-Admin user is logged in. The Quote Center home page (pictured below) also displays Company Name, User Name, Total Number of Unsent Customer Requests and Total Number of New Dealer Responses.



Note: If this is a new install read the section about Admin Tools.

Admin Tools allows you to customize specific areas of Quote Center for ease of use.

To view saved Customer Requests, or to create a new requests click the **Go** button for that page, or the underlined text **You Have X Unsent Customer Requests**. If there are 0 Unsent Customer Requests use the tool bar at the top of the Customer Request page to access Admin Tools, Customer Requests, Dealer Responses, History, Contact Us or Log Out. For instruction of use refer to the specific chapter in this manual, or for definition of tool bar see page 40, or options see the Glossary of Terms section.

The Customer Requests page also displays all pending and saved Customer Requests received from Web Carbook, with a maximum view of 15 requests at a time. Use the **First**, **Previous**, **Next** and **Last** options to navigate through the list. Each column has a sort function, which can be sorted chronological, numerically or alphabetical dependent on the type of data entered. Also in ascending, and then descending order if sorted on the same column again. To change a sort order, **single click** on the **column header**.

There are five functioning buttons on this page **Help**, **Create**, **Delete**, **Unlock** and **Go**. The **Unlock** button will only appear if you are a Quote Center HUB and logged in as an Admin User on the Chrome.com System Login page.

- **Help**, content sensitive assistance.
- **Create**, function used to create a new Customer Request
- **Delete**, function used to delete an existing Customer Request.
- **Unlock**, used to unlock a checked out Customer Request.
- **Go**, this function will expand the selected record for editing, details or viewing.

Customer Requests page

Chrome.com

File Edit View Help

Back Login

CHROME DATA CORPORATION

QUOTE CENTER

Admin Requests Responses History Contact Us Log Out

Customer Requests You have 78 Unsent Quote Requests. Your Customer Request folder is where you analyze incoming Web Carbook Quote Requests and send them to dealers. **HELP**

Create Delete Unlock

<< FIRST < PREVIOUS NEXT > LAST >>

Go	From	Customer	Year/Make/Model	Date
Go		Theresa Spee	0 Plymouth Neon	6/17/99
Go	CJ Tom Garrigus	Joe Joe	1999 Acura Integra	6/20/99
Go	CJ Tom Garrigus	a a	1999 Acura NSX	6/30/99
Go	CJ Tom Garrigus	hhhh kkkk	1999 Honda Prelude	7/1/99
Go	CJ Tom Garrigus	q q	1999 Audi A6 Series	7/1/99
Go	CJ Tom Garrigus	s s	1999 Buick Century	7/1/99
Go	CJ Tom Garrigus	t t z	1999 Dodge Stratus	7/1/99
Go	CJ Tom Garrigus	s s	1999 Kia Sephia	7/1/99
Go	CJ Tom Garrigus	d d	1999 Isuzu Hombre	7/1/99
Go	CJ Tom Garrigus	t z	1999 Saab 9-3	7/1/99
Go	CJ Tom Garrigus	w w	1999 Porsche Boxster	7/1/99
Go	CJ Tom Garrigus	x x	1999 Porsche Boxster	7/1/99
Go	CJ Tom Garrigus	t z	1999 Chrysler 300M	7/1/99
Go	CJ Tom Garrigus	t z	1999 Buick Park Avenue	7/1/99
Go	CJ Tom Garrigus	www s	1999 Cadillac Concorde	7/1/99

(1-15) of 78 records

<< FIRST < PREVIOUS NEXT > LAST >>

http://www.chrome.com/Business/RFQMaint.asp 2:35 PM 07/27/1999

To create a Customer Request **click** the **Create** button.

Create Request page

Chrome.com

File Edit View Help

Back x Home Login

CHROME DATA CORPORATION

QUOTE CENTER

Admin Requests Responses History Contact Us Log Out

Create Request

Click the section header and add the information. Once you have verified the information is correct, you can either save or send the request by clicking the appropriate selection.

Request Type

☒ Customer Request ☐ Customer Lead

STEP 1 Customer Info — Go

STEP 2 Vehicle Info — Go

STEP 3 Request Details — Go

STEP 4 Send To... — Go

STEP 5 Save — Go **Send** — Go

http://ecmdev/Buying/RFQEd1.asp 10:01 AM 9/24/99

Step 1, Customer Info, an asterisk (*) indicates a required field, required fields are First Name, Last Name, Address, City, State, Zip and Phone. Optional fields are Zip+4, Evening Phone and E-mail. Once the required fields are complete, click the **OK** button, to return to the Create Request page. Or click the **cancel** button to cancel the Customer information entered and return to the Create Request screen.

Customer Information screen

Customer Information -- Web Page Dialog

CHROME.COM

QUOTE CENTER

Customer Information

* Indicates a required field

First Name*:

Last Name*:

Address*:

City*:

State*:

ZIP*:

ZIP+4:

Phone*:

Evening Phone:

E-Mail:

Ok Cancel Search

http://ecmdev/Admin/CustomerForm.asp Local intranet zone

The Search function is a “Wild Card” search. You can enter partial information and the system will search on any criteria that fits the information entered. Once the customer information is displayed click the **Go** button and the Customer Information screen will be displayed. Then Click the OK button to return to the Customer Request and attach the entered information. Or click the Cancel button to return to the Customer Request without updating any Customer information. Or click the Search to enter the Customer Search section. Or at any time scroll to the bottom of the Customer Search screen and click the Close button, this will return you to the Customer Information screen.

- **Search**, used to search on the criteria entered in the search field.
- **Clear**, used to clear all the information entered in the search field.
- **Show All**, will show a list of all your Customers.

Customer Search screen

Quote Center | Customer Search - Web Page Dialog

CHROME.COM

QUOTE CENTER

Customer Search

First Name:
 Last Name:
 Street Address:
 City:
 State:
 Zip Code:
 Zip Plus 4:
 Phone Number:
 E-Mail:

<< FIRST < PREVIOUS NEXT > LAST >>

Go	Name	City	State	Phone
<input type="button" value="Go"/>	74729 test1	oregon city	OR	5039599333
<input type="button" value="Go"/>	74729 test2	oregon city	OR	5036505939
<input type="button" value="Go"/>	Audie Murphy	oregon city	OR	5039541234

https://ecmdev/Admin/CustomerSearch.asp?ID=0&FN=0 Local intranet zone

Once the Customer information has been entered select either Customer Request or Customer Lead.

- **Customer Request**, this function when selected will send the institution information which is determined in Admin Tools. It will send the institution name only, or all institution information, or an anonymous request to dealers, which returns the quote back to the institution, this requires a Response Center to be used to reply back.
- **Customer Lead**, this function sends the customer information and institution information to the dealer and the dealer will contact the customer directly.

Use the scroll bar for viewing next step.

Step 2, Vehicle Info, click the **Go** button to launch PC Carbook.

Refer to the PC Carbook Quick Reference Card for instruction of use.

- All colors selected in PC Carbook will be listed on the vehicle report sent to the dealer. However, the colors are listed in order of the selection screen, not in order of selection. One to all color combinations can be selected.
- Once the color has been selected click on **File**, then select **Return to Chrome.com**.

Now the Vehicle Information page is available, this is a list of All Vehicles open in PC Carbook. Click the **Go** button, in the Go column, of the vehicle you would like to match to this request. Now the Option Ranking page is available for that specific vehicle request. Select the appropriate rank for each option then click the **OK** button to return to the Create Request page.

Use the scroll bar for viewing next step.

Step 3, Request Details, click the **Go** button. This is the Quote Request Details section. This section allows you to enter the number of days the request will be open (default is pre-set in Admin Tools, and can be changed for each request), once the Number of Days field is entered the Quote Expiration Date will become active. This screen also provides a Comments field with the maximum of 254 characters and is used to send detailed information to the dealer. Click the **OK** button to return to the Create Request page.

Quote Request Details

RFQ Details -- Web Page Dialog

CHROME.COM
QUOTE CENTER

Quote Request Details

Number of Days:

Quote Expiration Date: Friday, September 24, 1999

Comments:

Ok Cancel

https://ecmdev/buying/RFQDetails.htm Local intranet zone

Use the scroll bar for viewing next step

Step 4, Send To..., click the **Go** button. The Custom Dealer List gives you the option to change the following search criteria; Zip Code Search or City/State Search. *The Zip Code Search and the City/State Search can not be used simultaneously.* There are five functional buttons, **Filter List**, **Show All**, **National List**, **Save** and **Cancel**.

- **Filter List**, use to filter your Customer Dealer List with the criteria entered. The Zip Code Search, or City/State Search must be used in conjunction with this filter. A valid 5 digit US zip code is required to create a proximity search.
- **Show All**, use to show your entire Dealer List.
- **National List**, use to add dealer recipient (s) from the National List.
(Dealer List has approximately 20,000 Dealers available for selection, located nation wide)
- **Save**, use to attach the highlighted Dealers to the Customer Request.
- **Cancel**, return to the Customer Request without attaching any dealers.

Example: enter the vehicle line of choice. Then select Zip Code Search, enter a valid 5 digit US zip code and select the radius of choice from the drop down menu. Next place the cursor on the dealer (s) of choice, select with a single click. Scroll to the bottom of the page and click the Save button. Or click the Cancel to cancel the selection.

Or

Enter the vehicle line of choice and then select the City/State Search and enter a valid US city and the corresponding state. Next place the cursor on the dealer (s) of choice, select with a single click. Scroll to the bottom of the page and click the Save button. Or click the Cancel to cancel the selection.

Custom Dealer List

Dealer List - Web Page Dialog

CHROME.COM

QUOTE CENTER

Custom Dealer List

Filter Custom List

Vehicle Line: Name:

Zip Code Search

☒ ZIP: Radius:

City/State Search

☐ City: State:

Filter List

Show All

National List

<< FIRST		< PREVIOUS		NEXT >		LAST >>	
Dealership	Address	City	ST	Zip	Rank	Makes	
de tom garrigus	524 Main St.	Oregon City	OR	97045	Excellent		
de jlug	333 West 1st Street	Oregon City	OR	97045	Excellent		
DE jhugtest1	524 Main Street	Oregon City	OR	97045	Excellent		
DE Celas	Dealer Lane	Oregon City	OR	97045	Excellent		
test dealer admin	524 Main	Oregon City	OR	97045	Excellent		
ECM Test DE	5123 Main Lane	Oregon City	OR	97045	Excellent		
de jhugnew	524 Main Street	Oregon City	OR	97045	Excellent		
de jhugtest	524 Main Street	Oregon City	OR	97045	Excellent		
dealer admin test	Main	Oregon City	OR	97045	Excellent		
test dealer admin	524 Main	Oregon City	OR	97045	Excellent		

11 of 11 results

<https://ecmdcv/Admin/DealerPick.asp?Make=&City=&Zip=> Local intranet zone

Next is the Optional Dealership Contact Information, you can enter a preferred contact name and fax number instead of using the dealership preferred notification settings pre-set in Admin Tools.

- If a contact name is entered and no fax number is entered Chrome.com will use the Dealer Preferred Notification settings.
- If a fax number is entered and no contact name is entered Chrome.com will use the Dealer Preferred Notification settings.
- If all fields are left blank Chrome.com will use the Dealer Preferred Notification settings.

Scroll to the bottom of the page and click the Save button.

Contact Information page

Optional Dealership Contact Information -- Web Page Dialog

CHROME.COM
QUOTE CENTER

Optional Dealership Contact Information


You can optionally enter the name of a contact person at a dealership and the fax number to reach the contact for this Quote Request only.


- The contact name will be displayed on the Quote Request notification.
- The fax number must be exactly 10 digits - area code first.
- The fax number will overwrite the current fax number entered by the dealership for this Quote Request only.
- If you input a contact name and no fax number, Chrome.com will use the dealership's preferred notification setting.
- If you input a fax number and no contact name or you leave both fields blank, Chrome.com will use the existing contact method for that dealership and disregard the fax # you entered (if applicable).

Dealership	Contact First Name	Contact Last Name	Fax Number
Name: ce ton garrigus Contact: Tom Garrigue Phone: 434/651-4100 Fax: 503/5561212			

http://chrome.com/Admin/DealerContact.asp?ID=7143E Local intranet zone

Use the scroll bar for viewing next step

Step 5, Save or Send. Click the  button of preference.

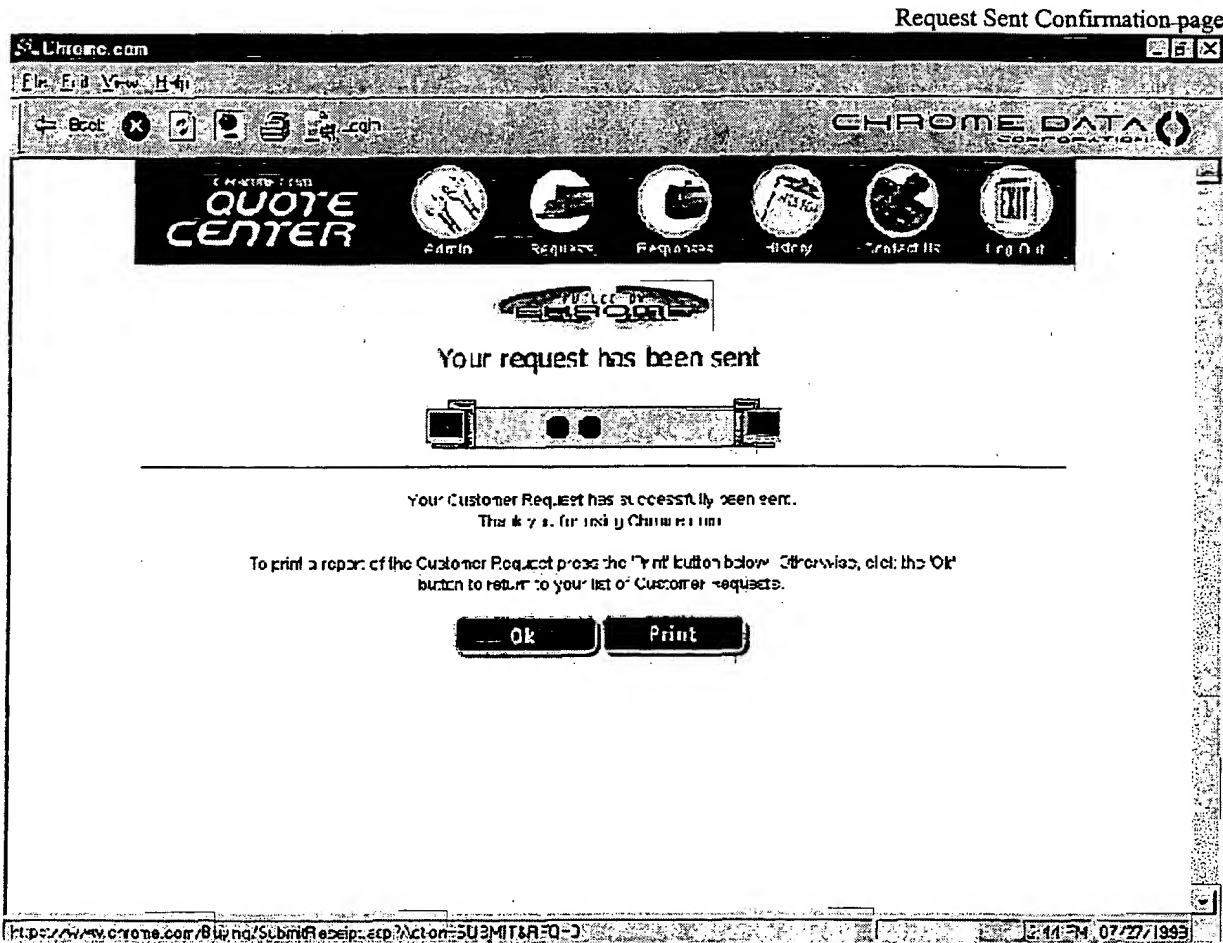
If **Save** is selected a message will be displayed "**Recipient information has been entered**" take note that the Send To information is not saved, and will need to be re-entered to submit the request. Click the  button to proceed with Save. Or click the **No** button to return to the Create Request page.

Save Confirmation

Recipient information has been entered.
The send to information will need to be re-entered on the final submit.
Press YES to proceed with Save.

If **Send** is selected the Customer Request will be sent to the selected dealers in the Send To section. The Quote Sent Confirmation page will confirm the Customer Request has been sent.

Note: To use the Send option you must have a completely configured vehicle and Customer Info (fields with an Asterisk (*) are required).



On the Request Sent click the **print** button for a Verification Report which lists the Quote Request number, Customer Information, Vehicle Information, Quote Request Details and the Quote Request Sent To, or click the **OK** button to return to the Quote Center, Customer Request page.

If the **Back** button is used, and the Customer Request is submitted a second time a slightly different confirmation screen will appear with a processing error message **"The Quote Request has already been submitted"**.

Customer Requests page

Customer Requests

You have 78 Unsented Quote Requests. Your Customer Request folder is where you analyze incoming Web Carbook Quote Requests and send them to dealers.

Buttons: Create, Delete, Unlock

Navigation: << FIRST, < PREVIOUS, NEXT, > LAST >>

Go	From	Customer	Year/Make/Model	Date
	CU Tom Garrigus	Theresa Spec	0 Plymouth Nono	6/17/99
	CU Tom Garrigus	Joe Joe	1999 Acura Integra	6/28/99
	CU Tom Garrigus	a a	1999 Acura NSX	6/30/99
	CU Tom Garrigus	Hhhh kkkk	1999 Honda Prelude	7/1/99
	CU Tom Garrigus	q q	1999 Audi A5 Series	7/1/99
	CU Tom Garrigus	a a	1999 Buick Century	7/1/99
	CU Tom Garrigus	z z	1999 Dodge Stratus	7/1/99
	CU Tom Garrigus	s s	1999 Kia Sephia	7/1/99
	CU Tom Garrigus	d d	1999 Isuzu Hombre	7/1/99
	CU Tom Garrigus	z z	1999 Seab 9-3	7/1/99
	CU Tom Garrigus	w w	1999 Porsche Boxster	7/1/99
	CU Tom Garrigus	x x	1999 Porsche Boxster	7/1/99
	CU Tom Garrigus	z z	1999 Chrysler 300M	7/1/99
	CU Tom Garrigus	z z	1999 Buick Park Avenue	7/1/99
	CU Tom Garrigus	www a	1999 Cadillac Concours	7/1/99

(1-15) of 78 records

Navigation: << FIRST, < PREVIOUS, NEXT, > LAST >>

http://www.chrome.com/Buying/REQMaint.asp 12:35 PM 07/27/1999

To edit an existing Customer Request click the button for that request.

This page allows you to edit the Customer Request before sending it to Dealers. Use the scroll bar to view the options.

The options on this page are; Step 1 – Customer Info, Step 2 – Vehicle Info, Step 3 – Request Details, Step 4 – Send, and Step 5 – Save or Send.

To edit one of the sections click the button for that section.

Customer Info: allows you to change the customers name, street address, city, state, zip code, home phone and email address. This page also allows you to select Customer Request which sends institution name only, or all institution information, or an anonymous request to dealers, which returns the quote back to the institution, this requires a Response Center to be used to reply back. Or the Customer Lead, which sends the customer information to the dealer and the dealer, will contact the customer directly. Refer to page 7 for more detail.

Vehicle Info: allows you to change the vehicle information, Year, Make, Model, Style, Options and color entered by the customer. This section opens PC Carbook to configure and or edit a vehicle configuration. Any options in the Option Configuration is changeable. Refer to page 8 for more detail.

Request Details: allows you to change the Number of Days the quote is open, and will show the Quote Expiration Date. This option also has a Comments section, used to deliver detailed comments from the customer or financial institution to the dealer or hub about this specific Quote Request. Refer to page 9 for more detail.

Send To...: allows you to Filter your Custom List or National Dealers List. You can select either Zip Code Proximity Search or City/State Search. With either selection you can filter for a specific manufacture line and/or dealer. To be able to Send, scroll to the bottom of the page and select Save. We recommend you have a Custom List set up when using the Send To function. However, dealers can be selected from the National Dealers List for each request sent. Refer to page 9 for more detail.

Save: allows you to save the Customer Request and places the saved request in the Customer Requests page. Refer to page 11 for more detail.

Send: allows you to send the Customer Request to the Dealers selected in the Send To section. Refer to page 12 for more detail.

To Delete an existing Customer Request, **single click the Customer Request (s)**-to be deleted, then **click the Delete button**. A message will pop up **"You are about to permanently delete X record (s)"**. (X = number of records to delete) click the **OK to Delete**. Or **click the cancel button** to return to the Customer Request page.

***Note:** The Delete function is permanent, there is no possibility to retrieve a deleted Customer Request, and the delete function will not send the Customer Request (s) to History.*

To Unlock an existing locked Customer Request, highlight the request and click the Unlock button. A request that is red is currently checked out (locked).

Chrome.com Dealer Responses

Once you have successfully logged into Quote Center, you will see four options, **Customer Requests**, **Dealer Responses**, **History** and **Admin Tools** (if logged in with Admin Status). To view a list of out going Customer Requests, and incoming dealer responses click the **Go** button for the Dealer Responses page, or the underlined text **You Have X New Dealer Responses**, on the Quote Center home page. To access another section in Quote Center use the tool bar at the top of the Dealer Responses page. For instructions of use refer to the specific chapter in this manual, or for definition of tool bar options see page 40, or the Glossary of Terms section. There is also a Help button for assistance at any time.

The Dealer Response folder is where incoming responses are analyzed and acceptances are sent back to Dealers. The Dealer Responses page displays Customer Requests and Customer Leads sent to dealers, with a maximum view of 15 requests at a time. Use the **First**, **Previous**, **Next** and **Last** options to navigate through the list. Each column has a sort function, which can be sorted chronological, numerically or alphabetical dependent on the type of data entered. Also in ascending and then descending order if sorted on the same column again. To change a sort order, **single click** on the **column header**.

There are three functional buttons on the Dealer Responses page (excluding the tool bar), **Help**, **Go** and the **Trash Can**, with an Affinity organization the delete/trash can will not be available, it will have a red circle with a slash through it. To move the Customer Request and the attached Dealer Responses to the History folder, click the Trash can for that record. Records that are displayed in **blue** were sent as Customer Lead, and the dealer will contact the customer directly.

- **Help**, content sensitive assistance.
- **Go**, this function will expand the selected record for editing, details and viewing..
- **Trash Can**, used to delete and move the Customer Request and all responses attached to the History folder.

Note: The "From" column is not displayed if you are an Affinity user.

Dealer Responses page

Chrome.com
QUOTE CENTER
 Dealer Responses
 You have 6 New Dealer Responses

Details	Req#	Reso	New	From	Customer Name	Year/Make/Model	Delete
⊕	21933	1	1		Glen Campbell	1993 Dodge Durango	⊗
⊕	21935	1	1		Clint Eastwood	1993 Mercede 560sl	⊗
⊕	21940				David Davidson	1993 Land Rover Range	⊗
⊕	21944				Cole Younger	1993 Jaguar XJ Serle	⊗
⊕	21942				Judy Johnson	1993 Lexus GS 400 Lx	⊗
⊕	21915				Ray Yabow	1993 Dodge Stratus	⊗
⊕	21937	1	1		James Bond	1993 Plymouth Grand	⊗
⊕	21918				Krista Foster	1993 Mercury Mountai	⊗
⊕	21938				Amanda Lee	1993 Porsche Boxster	⊗
⊕	21922	1	1		James Stewart	1993 Honda CR-V	⊗
⊕	21916				Ann Howard	1993 Ford Windstar	⊗
⊕	21941				Wisconsin Endicot	1993 Land Rover Range	⊗
⊕	21931	1	1		Dora Day	1993 Ford Mustang	⊗
⊕	21939				Bill Elliott	1993 Oldsmobile Intr	⊗
⊕	21943				Mary Nigh	1993 Lincoln Navicat	⊗

(1-15 of 15 records)

* = Customer Request was forwarded to another organization for processing.
 B = Customer Request was forwarded to another organization for processing and no replies have been received yet.
 To View the Customer Request and any attached Dealer Responses, click the 'Go' button.
 To move the Customer Request and the attached Dealer Responses to the History folder, click the 'Trash Can' button.
 A record that is Blue is one that was sent as a Customer Lead.

To view a summary of a record click the **Go** button for that record.

There are five buttons on the Dealer Response Summary page **Help**, **New**, **Go**, **Details** and **Dealers**. There is no functionality to the **New** button other than to notify you of a new Dealer Response.

- **Help**, content sensitive assistance.
- **New**, notification of New dealer response.
- **Go**, this function will expand the selected record for viewing details.
- **Details**, click to view a printable report of the Customer Request vehicle spec (see page 16).
- **Dealers**, click to view the Dealers that were sent the Customer Request (see page 17).

Dealer Responses Summary

The Dealer Response Summary highlights Dealer Responses that are for a specific Customer Request. You can view further details on a specific Dealer Response by clicking the Go button.

New	Details	Response #	Dealership	Valid Unit	Year/Make/Model
		21947	de ton garages	10/2/99	1999 Dodge Durango

1-1 of 1 records

- To view the Dealer Response, click the 'Go' button.
- A response that is red was a Positive No Bid response by the dealer.
- To view the Requested Vehicle Details, click the 'Details' button below.
- To view the dealers this Request was sent to, click the 'Dealers' button below.

Request Information for # 21933

Customer Name: Glen Campbell
 Street Address: 248 S Country Lane
 City: Oregon City
 State: OR
 Zip + 4: 97045 - 0000
 Day Phone: 5037899876
 Evening Phone:
 E-mail:
 Year/Make/Model/Style: 1999 Dodge DurangoDNSL74 - 4dr 4WD
 Expires On: 10/1/99 11:12:27 AM
 Additional Comments:

To view the Details of a Response click the **Go** button. If it is a valid response (not a No Bid) it will expand to a Dealer Responses Details page. However, if the response is **Red** it is a positive **No Bid** from the dealer. Click the **Go** button to view possible reasons for a no bid.

The four buttons for use with the Dealer Responses Details page are **Help**, **Print**, **Compare** and **Accept**.

- **Help**, content sensitive assistance.
- **Print**, will display a printable report of the Customer Request and all the attached Dealer Responses (see page 17).
- **Compare**, will display a comparison report of the Customer Request and the specific Dealer Response (see page 18).
- **Accept**, will send the acceptance to the specific Dealer Response (see page 18).

CHROME.COM
QUOTE CENTER

Dealer Responses

The Dealer Response Details highlights a specific Dealer Response for a specific Customer Request. You can view a comparison of the Request and the Response by clicking the 'Compare' button. If you want to accept a Dealer Response, click the 'Accept' button.

Response # 21980

Response Information

Valid Until: 10/3/99 10:14:36 AM
Year/Make/Model: 1999 Hyundai Sonata
Style: 23403 - 99A 4dr Sdn Manual
Price: \$17900
Comments:

Response From

Dealership name: de ton garrigus
Rep. Name: admin user
Address: 245098 Main
City, Stat, Zip: Oregon City, OR 97045-0000
Accepted: No
Member: Yes

http://localhost/Reports/QuoteDetails.aspx?QuoteID=21980&RPIID=21980&Acceptance=TRUE&Forwarded=0 10:10 AM 10/4/99

To view and print a report of the Customer Request information and the Dealer Response information click the **Print** button for the Quote Details report and it will list general information. A message box will occur "Use the Print button to print report. Close the Window when done" click the OK button, then select the browser print button to print. To close the window select the in the upper right corner of the screen.

CHROME.COM **Quote Details**

Quote Request #21959

Customer Information	Vehicle Information
Name: Zac Henderson	Year: 1999
Street: 495 W River Road	Make: Hyundai
City: Oregon City	Model: Sonata
State: OR	Style: 23403 - 99A 4dr Sdn Manual
ZIP: 97045-0000	Price: \$14,240.00
Home Phone: 5039563511	

Quote Request Detail

Closing Date: Sunday, October 03, 1999
Comments:

Quote Response #Q21961

Click the **Compare** button to view a side-by-side report of the request and response information. This displays all the information: **Options, Ranking, Color, Comments, Price** etc. there are two buttons on the Request to Response Comparison screen **Close** and **Print**. Scroll to the bottom of the page to access either button. Close will return you to Quote Details page. If Print is selected a message box will occur "Use the Print button to print report. Close the Window when done" click the OK button, then select the browser print button to print. To close the window select the ☒ in the upper right corner of the screen.

Request to Response Comparison

CHROME.COM
QUOTE CENTER

Request to Response Comparison

This is a comparison of Customer Request #21959 and Dealer Response #Q21960.

Request to Response Comparison

	Request	Response
Year	1999	Same
Make	Hyundai	Same
Model	Sonata	Same
Style	23403 - 99A 4dr Sdn Manual	Same
Price	\$14240	\$17900
Comments		Same

Optional Equipment Comparison

Customer Request	Dealer Response	Option Ranking	Option	Description
X	X		NATIONAL DESTINATION	***** THIS VEHICLE IS NO LONGER ORDERABLE *****

AL ASKA DESTINATION CHARGE ADJUSTMENT

http://ecmtest/reports/report.asp?RPT=dlgcomp&RID=21 Local intranet zone

Click the **Accept** button to Accept the quote. At this time the HUB or Affinity can chose which contact information to send the dealer, either the organizations or the customers. If the Customers information is sent it can be filtered to include any of the following: **address, phone** and **email**. Once the information is entered click the **OK** button to send the acceptance.

Institution Acceptance Information

CHROME.COM
QUOTE CENTER

Acceptance Info

What information do you want sent back with the acceptance letter?

☒ Institution ☐ Customer

Institution Name: Hub Beer Hug
Institution Address: 509234 Main
Oregon City, OR
97045-0000

Agent Name: admin user
Agent Phone: 5036509622
Agent E-Mail: smcintee@chrome.com
Agent Fax: 5036505600

Ok Cancel

http://ecmtest/Buying/QuoteAcceptInfo.asp?RID=21 Local intranet zone

Customer Acceptance Information

CHROME.COM
QUOTE CENTER

Acceptance Info

What information do you want sent back with the acceptance letter?


☐ Institution ☒ Customer

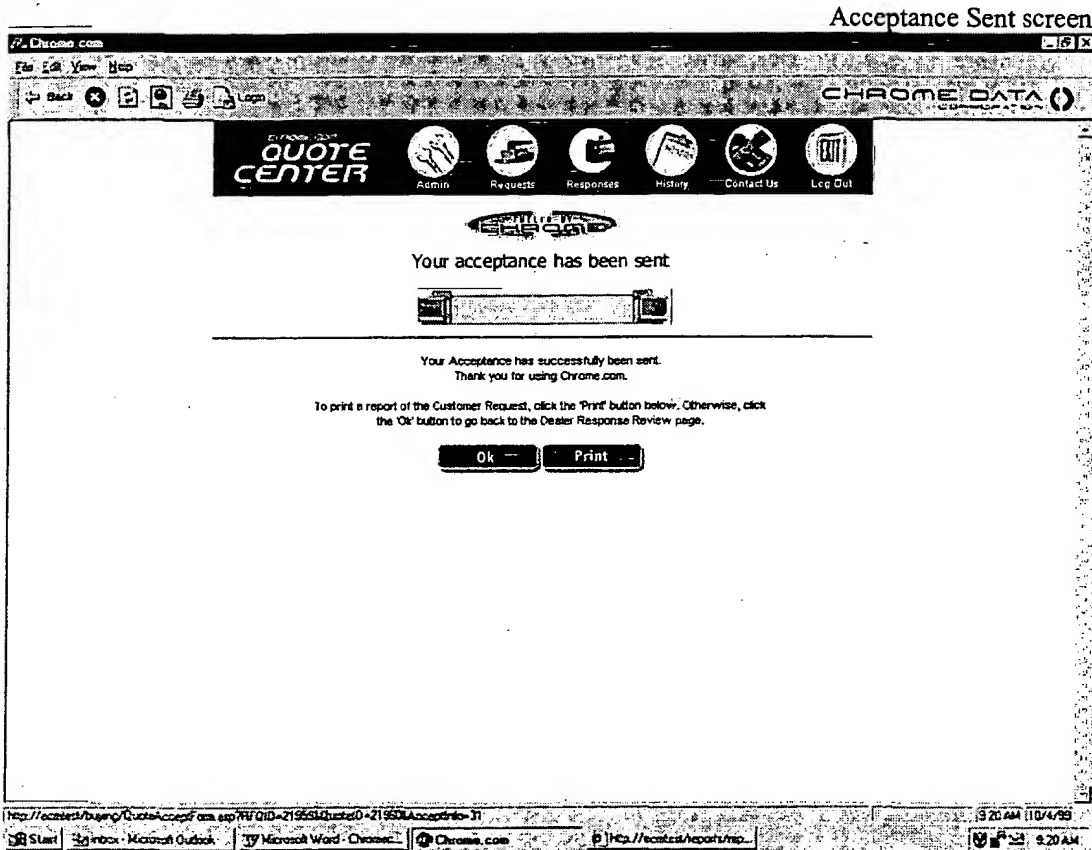
Name: Zach Henderson
☒ Address: 495 W River Road
Oregon City, OR
97045-0000

☒ Phone: 5039583511
☒ Evening Phone:
☒ E-Mail

Ok Cancel


http://ecmtest/Buying/QuoteAcceptInfo.asp?RID=21 Local intranet zone

Next the Acceptance page will be displayed, this is a confirmation that the Acceptance has been sent to the dealership. This page has two buttons **OK** and **Print**. If the **OK** button is selected it will return you to the Dealer Responses page. If the **Print** button is selected it will display an **Acceptance Report**, and a message will be displayed *"Use the Print button to print report. Close the Window when done"* click the **OK** button, then select the browser print button to print. To close the window click the  in the upper right corner of the screen.



If you do not want to Print, Compare or Accept the response, click the **"Back"** button on your browser.

Another Option on the Dealer Responses Summary is the **Details** button. If this option is selected a Detailed Customer Request report will display the following: **Customer information, vehicle identification, desired options, Ranking, vehicle price, selected colors** and any attached **comments**.

This is a printable report, use the print button on your browser to print. To close the window click the  in the upper right corner of the screen and return to the Dealer Requests Summary.

Customer Request report

http://ecmtest/reports/VehicleReport.asp?RFQID=21941 - Microsoft Internet Explorer

File Edit View Go Favorites Help

Back Forward Stop Refresh Home Search Favorites History Channels Fullscreen Mail Print

Address http://ecmtest/reports/VehicleReport.asp?RFQID=21941 Links

CUSTOMER REQUEST #21941

Wescott Endicott
85 N85th
Oregon City, OR 97045

Vehicle Identification

1999 Land Rover Range Rover
4dr Wgn SE 108" WB II

Desired Options

Ranking*	Code	Description
3	—	STANDARD PAINT

* Ranking of options is used on a scale of 1 - 5, with 5 being the most important.

Local intranet zone

The last option on the Dealer Responses Summary is the **Dealers** button. This screen displays the dealer information for all the dealers that received the Customer Request. Click the **OK** button to return to the Dealer Responses Summary.

Customer Request Details

Review Quote Request Details -- Web Page Dialog

CHROME.COM
QUOTE CENTER

Customer Request Details

Customer Request Terms
These are the terms you are currently sending to dealerships. If you wish to change them, go to the Admin Tools and click the Terms link.

Dealer Recipients
The Customer Request was sent to the following dealerships.

Name: de tom garrigus
Address: 245098 Main
Oregon City, OR 97045-0000
Fax: 5036505600
Phone: 5036505938
Exposure: Full Exposure
Member?: Yes

Ok

http://ecmtest/Using/RFQReviewDetails.asp?RFQID=21941 Local intranet zone

History

Once you have successfully logged into Quote Center, you will see four options, **Customer Requests**, **Dealer Responses**, **History** and **Admin Tools** (if logged in with Admin Status). To view the **History** folder click the **Go** button for that page or the underlined text **History**.

The History folder stores the processed Customer Requests and Dealer Responses that have been **Deleted**, **Expired** or **Accepted** on the Dealer Responses page. There are only two buttons on the History Page, **Help** and **Go**.

- **Help**, content sensitive assistance.
- **Go**, this function will expand the selected record for viewing details.

History page

History Your History folder is where all of the Deleted, Accepted and Expired Customer Requests and Dealer Responses reside.

Details	Ref#	Resp	From	Customer	Year/Make/Model
Go	21818	5	Noodles Federal Cred	76025 test 3	2000 Buick Century
Go	21819	2	Noodles Federal Cred	76025 test 4	2000 Cadillac Escalade
Go	21819	2	Noodles Federal Cred	76025 test 4	2000 Cadillac Escalade
Go	21821	2	Noodles Federal Cred	76025 test 2	2000 GMC Yukon XL
Go	21823	3	Noodles Federal Cred	76025 test 4	2000 Nissan Xterra
Go	21825		Noodles Federal Cred	76025 test 2	1999 Hyundai Tiburon
Go	21827		Noodles Federal Cred	76025 test 4	1999 Mitsubishi Mon
Go	21829		Allen FCU	76025 test 2	1999 Chrysler Concor
Go	21831		Allen FCU	76025 test 4	1999 Honda Accord Co
Go	21831		Allen FCU	76025 test 2	1999 GMC Yukon XL
Go	21835	4	Allen FCU	76025 test 4	2000 Nissan Xterra
Go	21835	4	Allen FCU	76025 test 4	2000 Nissan Xterra
Go	21837		Allen FCU	76025 test 2	1999 Hyundai Tiburon
Go	21839	2	Allen FCU	76025 test 4	2000 Mitsubishi Mon
Go	21840		San Jose State FCU	76025 test 1	1999 Jaguar S-TYPE

1-15 of 24 records

<< FIRST < PREVIOUS NEXT > LAST >>

- To review a Customer Request and the attached Dealer Responses, click the 'Go' button.
- A record that is Blue was one that was sent as a Customer Lead.

To view the details of a Customer Request and attached Dealer Response click the **Go** button. There is a maximum view of 15 records at a time, use the **First**, **Previous**, **Next** and **Last** options to navigate through the list. Each column has a sort function, which can be sorted chronological, numerically or alphabetical dependent on the type of data entered. Also in ascending, and then descending order if sorted on the same column again. To change a sort order, **single click** on the **column header**. As in the Dealer Responses section a **blue** record was sent as a Customer lead.

This page contains the basic Customer Request information and Dealer Response information. And is the most detailed of either information once it is moved to the History folder.

History Details page

The screenshot shows a web browser window with the address bar displaying `http://ecmest8.org/DealersQuoteSystem.asp?AFID=21841"ES=0&Forwarded=0`. The page title is "History Details". The main content area displays the following information:

Request Information for # 21841
Retrieved From: Jar Jar Birx FCU

No Dealer Responses

Quote Request #: 21841
Customer Name: 76027 test 2
Street Address: 4590 wosaru
City: oregon city
State: OR
Zip: 97045-0000
Customer Phone: 2000 Lincoln Town Car, 4dr Sdn Signature
Closing Date: id 76027 hub yogi is eth. received by hub yogi as customer request. sent to dealers as customer request.
Invoice: \$38,342.00
Year/Make/Model/Style: Tuesday, September 14, 1999
Comments: created in web as jar jar birx fcu

The browser's taskbar at the bottom shows several open applications: Internet Explorer, Microsoft Outlook, Chrome.com, and Microsoft Word - Chrome.com. The system clock in the bottom right corner indicates the time is 2:22 PM on 10/4/99.

Admin Tools

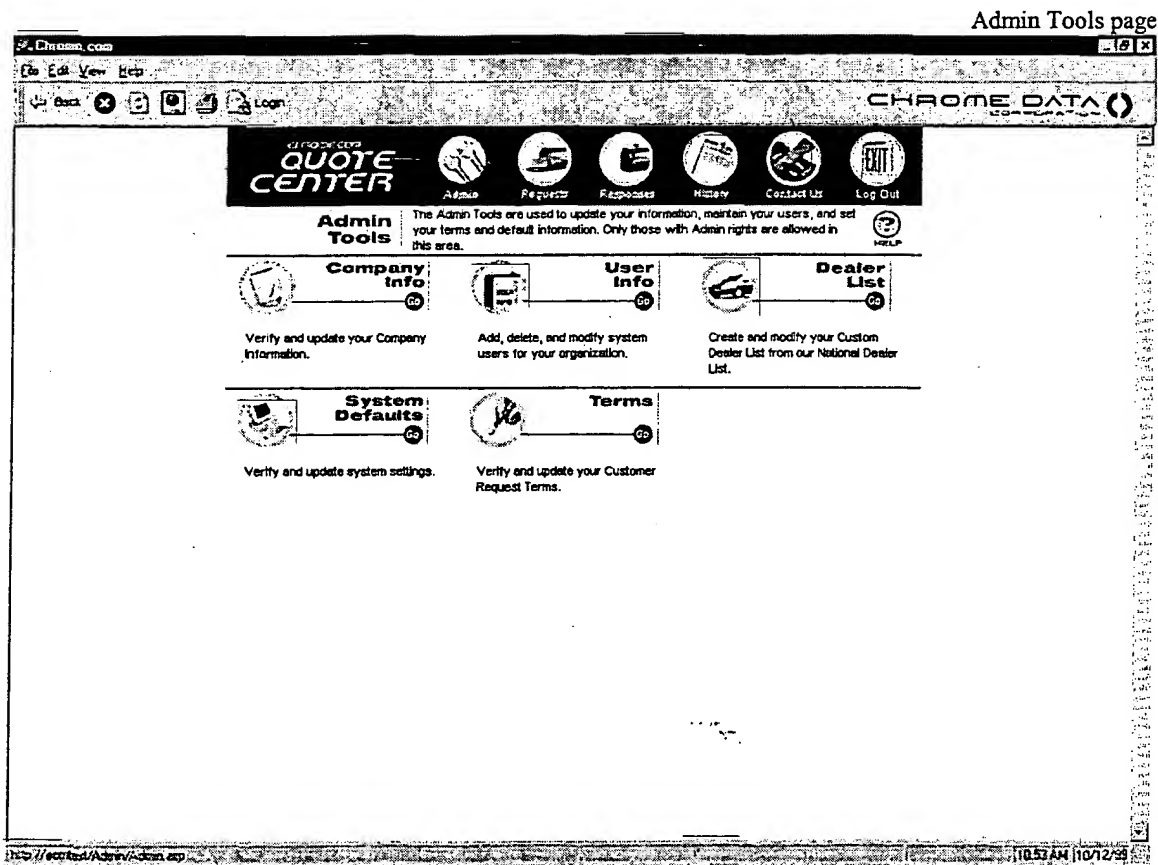
Once you have successfully logged into Quote Center, you will see four options, **Customer Requests, Dealer Responses, History** and **Admin Tools** (if logged in with Admin Status). To view and modify the Admin Tools functions, click the **Go** button for the Admin Tools page, or the underlined text **Admin Tools**, on the Quote Center home page. To access another section in Quote Center use the tool bar at the top of the Admin Tools page. For instructions of use refer to the specific chapter in this manual, or for definition of tool bar options see page 40, or the Glossary of Terms section. There is also a Help button for assistance at any time.

The Admin Tools section is where you set up Quote Center to operate for your institution. The Admin Tools are used to update your institution, maintain your users and set your terms and defaults.


Note: Only user's with Admin rights have access to Admin Tools.

There are five sections to Admin Tools: **Company Info, User Info, Dealer List, System Defaults** and **Terms**.

- **Company Info**, use to verify and modify your Company Information. Refer to page 24 for details.
- **User Info**, add, delete and modify system users for your organization. Refer to page 25 for details.
- **Dealer List**, create and modify your Custom Dealer List from the Chrome.com National Dealer List. Refer to page 27 for details.
- **System Defaults**, verify and update system settings. Refer to page 32 for details.
- **Terms**, verify and update your Customer Request Terms. Refer to page 39 for details.

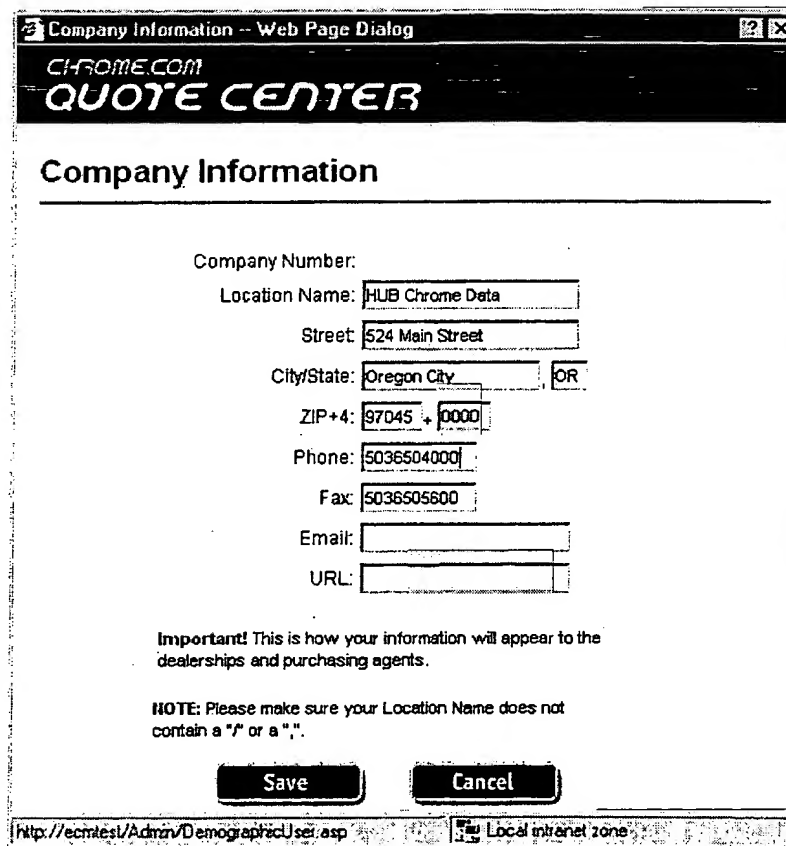


Company Info

To verify and update your Company Information click the  button, **Company Info** text or the icon, on the Admin Tools page.

There are two buttons on the Company Info screen: Save and Cancel

- **Save**, return to Admin Tools and save any changes made.
- **Cancel**, return to Admin Tools without saving changes made.



The screenshot shows a web browser window titled "Company Information -- Web Page Dialog". The page header includes "CHROME.COM" and "QUOTE CENTER". The main heading is "Company Information". Below this, there are several input fields for company details: "Company Number:" (pre-filled with "HUB Chrome Data"), "Location Name:" (pre-filled with "524 Main Street"), "Street:" (pre-filled with "Oregon City"), "City/State:" (pre-filled with "OR"), "ZIP+4:" (pre-filled with "97045 + 0000"), "Phone:" (pre-filled with "5036504000"), "Fax:" (pre-filled with "5036505600"), "Email:" (empty), and "URL:" (empty). Below the fields, there is an "Important!" note stating: "This is how your information will appear to the dealerships and purchasing agents." followed by a "NOTE: Please make sure your Location Name does not contain a '/' or a ','." At the bottom of the form are two buttons: "Save" and "Cancel". The browser's address bar shows "http://ecmtest/Admin/DemographicUser.asp" and the status bar indicates "Local intranet zone".

Company Information page

The Company Info screen lists your company number (non-editable number generated by Chrome Data Corp. and used as a verification number), Location Name, Street, City/State, Zip+4, Phone, Fax, Email and URL. All information you enter pertains to your company and is editable. The information entered in this section is what will be sent to the dealerships and Auto Advisors.

Note: Please make sure your Location Name does not contain a "/" or a ",".

User Info

To Add, delete or modify system users for your organization click the **Go** button, **User Info** text or the icon, on the Admin Tools page.

User Information screen

Edit	First Name	Last Name	Admin?	Delete
Go	admin	user	Y	
Go	nonadmin	user	N	

(1-2) of 2 records

- To create a new user, click the 'Create' button.
- To update a users information, click the 'Go' button.
- To delete a user, click the 'Trash Can' icon.

There must always be at least one account setup with Admin rights, to gain access to Admin Tools. The User Info page gives access to Create, Update or Delete a user. There are three buttons on the User Information screen: **Create**, **Go** and **Delete**.

- **Create**, allows you to add a new user.
- **Go**, this function will expand the selected record for editing or viewing details.
- **Close**, return to Admin Tools.

There are two types of User's: Admin and Non-Admin.

- **Admin**, the Agent has administrative rights.
- **Non-Admin**, Agent can not access Admin Tools.

To add a new user, click the **Create** button. On the "Add New User" screen an asterisk (*) indicates a required field. Required fields include First Name, Last Name, Phone, Login Name, Password and Confirm Password. Optional fields are Email, Fax and Admin Rights. Once the user info has been entered click the **Save** button.

There are two buttons on the Add New User screen: **Save** and **Cancel**.

- **Save**, return to User Info screen and save New User.
- **Cancel**, return to User Info screen without saving New User.

Add New-User

Agent Maintenance – Web Page Dialog

CHROME.COM
QUOTE CENTER

Add New User

First Name*
Last Name*
Phone*
EMail:
Fax:
Login Name*
Password*
Confirm Password*
Admin Rights: ☐

Note: * Indicates a required field

Save **Cancel**

http://ecmtest/Admin/ Local intranet zone

To review or modify a Users Information click the **Go** button for that record. On the Edit User Information screen an asterisk (*) indicates a required field. Required fields include First Name, Last Name, Phone, Login Name, Password and Confirm Password. Optional fields are Email, Fax and Admin Rights. Once the User Information has been modified click the **Save** button.

The same two buttons on the Add New User information screen are also on the Edit User Information screen, see above. To return to the Admin Tools page click the **Close** button on the User Information Main screen.

Edit User Information screen

Agent Maintenance – Web Page Dialog

CHROME.COM
QUOTE CENTER

Edit User Information


First Name* admin
Last Name* user
Phone* 5036509822
EMail: smcintee@chrome.com
Fax: 5036505500
Login Name* admin
Password* ***
Confirm Password* ***
Admin Rights: ☒

Note: * Indicates a required field

Save **Cancel**

http://ecmtest/Admin/ Local intranet zone

Dealer List

To create or modify your Custom Dealer List click the  button, **Dealer List** text or icon on the Admin Tools page.

There are nine buttons on the Custom Dealer List: **Filter List**, **Show All**, **Add Remove**, **Go**, **Trash Can**, **Car icon**, **Change** and **Close**.

- **Filter List**, use to Filter your Custom Dealer List after entering your filter criteria.
- **Show All**, use to show your entire Customer Dealer List.
- **Add**, click to go to the National Dealer List.
- **Remove**, use to remove selected dealers from Custom Dealer List.
- **Go**, this function will expand the Sender Information screen for viewing details and editing settings for that specific dealer.
- **Trash Can**, use to remove the specific Dealer from list.
- **Car icon**, use to view the makes carried by a specific dealer.
- **Change**, use to review or modify your Dealer List default settings.
- **Close**, click to return to Admin Tools.

Custom Dealer List

Quote Center | Custom Dealer List -- Web Page Dialog

Filter Custom List

Vehicle Line: Name:

Zip Code Search ☐ ZIP: **City/State Search** ☐ City: State:

Radius:

Filter List **Show All** **Add**

Remove

Go	Dealership	Address	City	ST	Zip	Rank	Makes	Delete
	de tom garrigus	245098 Main	Oregon City	OR	97045	Excellent		
	DE John Hug	555 Main	Oregon City	OR	97045	Excellent		

(1-2) of 2 records

- To add a dealer to your list, click the 'Add' button.
- To review the dealer settings for a specific dealer, click the 'Go' button.
- To review the makes carried by a specific dealer, click the 'Car' icon.
- To remove a dealer from your custom list, click the 'Trash Can' icon.
- To remove multiple dealers from your custom list, select the dealers to remove and click the 'Remove' button.

Please select no more than 10 dealers at a time.

Your Default Dealer List Settings are: [all] **Change**

Close

http://ecmtest/Admin/DealerList.asp Local intranet zone

The Custom Dealer List allows you to review, add and remove dealers from your Custom List. Dealers to be added to your Custom List are selected from the Chrome.com National Dealer List with approximately 20,000 dealers Nation wide available for your selection.

There are three Filter Options used with the Dealer List: Show All, Zip Code/Proximity Search and City/State Search. The Zip Code/Proximity search and the City/State search can not be used simultaneously.

To filter your Custom Dealer List enter a valid US zip code in the zip code search field, select the Radius and then click the **Filter List** button. The function of the Filter List button is to modify your current view of your Custom Dealer List, and will not add new dealers from the National List. A message **"No Dealers Found with given search criteria"** will be displayed if a match is not found.

To remove a dealer (s) from your Custom Dealer List highlight the specific dealer (s) and click the **Remove** button. A message will be displayed **"You are about to remove X dealerships from your dealer list. Are you sure?"** click the **OK** button to remove the dealerships or Cancel to return to the Custom Dealer List. The Remove button allows you to remove multiple dealers at a time verses the Trash Can icon that will remove one specific dealer.

Note: If the zip code information is not entered a message will be displayed **"You must type in a 5 digit zip code from which to create a proximity search."** Click the **OK** button to clear message.

To show your entire Custom Dealer List click the **Show All** button. To add a dealer to the list click the **Add** button.

There are two buttons on the Add From National List (search criteria) screen: **Search** and **Cancel**.

- **Search**, use to search the national Dealer List on the criteria entered.
- **Cancel**, return to your Custom Dealer List.

Add From National Dealer List (search criteria) screen

Add From National Dealer List - Web Page Dialog

CHROME.COM
QUOTE CENTER

Add From National Dealer List

You must select at least two fields to filter the National Dealer list.

Filter Custom List

Vehicle Line: Name:

Zip Code Search

☒ ZIP: Radius:

City/State Search

☐ City: State:

Search

Cancel

http://ecmtest/Admin/DealerSearch.asp Local intranet zone

On this portion of the Add screen you must enter the search criteria (Zip Code/Radius search or City/State search) and **click the Search button** to get a list of Dealers that match the criteria entered.

There are three buttons on this section of the Add From National Dealer List: Search, Add and Cancel.

- **Search**, use to perform another search on the National Dealer List.
- **Add Dealer**, use to return to your Custom Dealer List and add highlighted dealer (s).
- **Cancel**, use to return to your Custom Dealer List without adding new dealer (s).

Add From National Dealer List (list of matches)

Add From National Dealer List - Web Page Dialog

Motors						
Ron Tonkin Dodge	3	19300 McLoughlin Blvd	Gladstone	OR	97027	
Thomason Imports	3	19400 SE McLoughlin Blvd	Gladstone	OR	97027	
Thomason Nissan	3	19505 Se McLoughlin Blvd	Gladstone	OR	97027	
Thomason Suzuki	3	19490 McLoughlin Blvd	Gladstone	OR	97027	
Thomason Toyota	3	19375 McLoughlin Blvd	Gladstone	OR	97027	
Town & Country Chry/Plym	4	16600 SE McLoughlin Blvd	Portland	OR	97267	
Town & Country Mitsubishi	4	16900 SE McLoughlin Blvd	Portland	OR	97267	

(1-16) of 27 records

<< FIRST

< PREVIOUS

NEXT >

LAST >>

To add dealer(s) to your Custom Dealer List, highlight them and click the 'Add Dealer' button.

To perform another search, click the 'Search' button.

If we don't have a dealer you know about, let us know by sending a message through the Contact Chrome page. Include the Dealership Name, Contact Name and Phone #.

Search

Add Dealer

Cancel

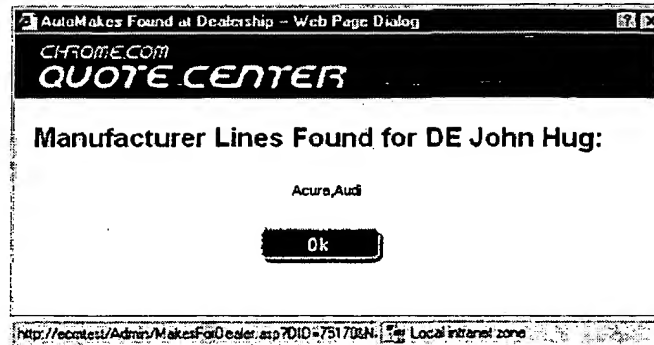
http://ecmtest/Admin/DealerSearch.asp

Local intranet zone

This portion of the Add screen returns the results that matched the criteria entered. Use the First, Previous, Next and Last buttons to navigate through the list. Each column has a sort function, which can be sorted chronological, numerically or alphabetical dependent on the type of data entered. Also in ascending, and then descending order if sorted on the same column again. To change a sort order, **single click on the column header**.

- To add dealers to your Custom List, **highlight the dealer (s)** and click the **Add Dealers** button.
- To view the makes carried by a specific dealer **click the Car icon**.
- To perform a new search, **click the Search button** and enter the search criteria again.
- To return to your Custom Dealer List without adding new dealers **click the Cancel button**.

To view the Makes carried by a specific dealer click the **Car icon** for that dealer, on the Add From National Dealer List.



To view the dealer settings click the **Go** button for that specific dealer, on the Custom Dealer List.

Sender Information Settings

There are two sections to Sender Information Settings: Institution Information Settings, with the selectable options of Name, All or None. And Preference Rank, with the selectable options of Excellent, Good, Fair and Poor. The settings in this section pertain to the specific dealer and are not your system default settings.

- **Name**, will display your institution name only on Customer Requests sent to dealers.
- **All**, will display all your institution information: Name, Address and Agent.
- **None**, will send an anonymous Customer Request to dealers.

There are two buttons on the Sender information Settings screen: Save and Cancel.

- **Save**, return to your Custom List and save the changes.
- **Cancel**, return to your Custom List without saving changes.

To view and modify your dealer list default settings **click** the **Change** button on the Custom Dealer List.

The screenshot shows a web browser window titled "Sender Information Settings". The address bar displays "http://ecmtest/Admin/RFQEXpoForm.asp" and the security status is "Local intranet zone". The page header includes "CIFORME.COM" and "QUOTE CENTER". The main heading is "Sender Information Settings".

Under the heading "Default Sender Information Setting", there are three radio button options:

- ☐ name Display institution name only
- ☒ all Display all institution information
- ☐ none Hide all institution information

Below this, under the heading "Update Privilege", there is a checkbox:

- ☐ Allow non-admin agents to update this setting


At the bottom of the form are two buttons: "Save" and "Cancel".

The settings in this section are the system default settings and will be used until they are changed for specific dealer records. There are two sections to the Sender Information Settings: Default Sender Information Settings with the selectable options Name, All or None. And the other section is Update Privilege that allows Non-Admin agents to update the Sender Information settings.

- **Name**, will display your institution name only on Customer Requests sent to dealers.
- **All**, will display all your institution information: Name, Address and Agent.
- **None**, will send an anonymous Customer Request to dealers.

To return to the Admin Tools page **click** the **Close** button on the Custom Dealer List page.

System Defaults

To view and modify your System Defaults click the  button, System Defaults text or the icon on the Admin Tools page.

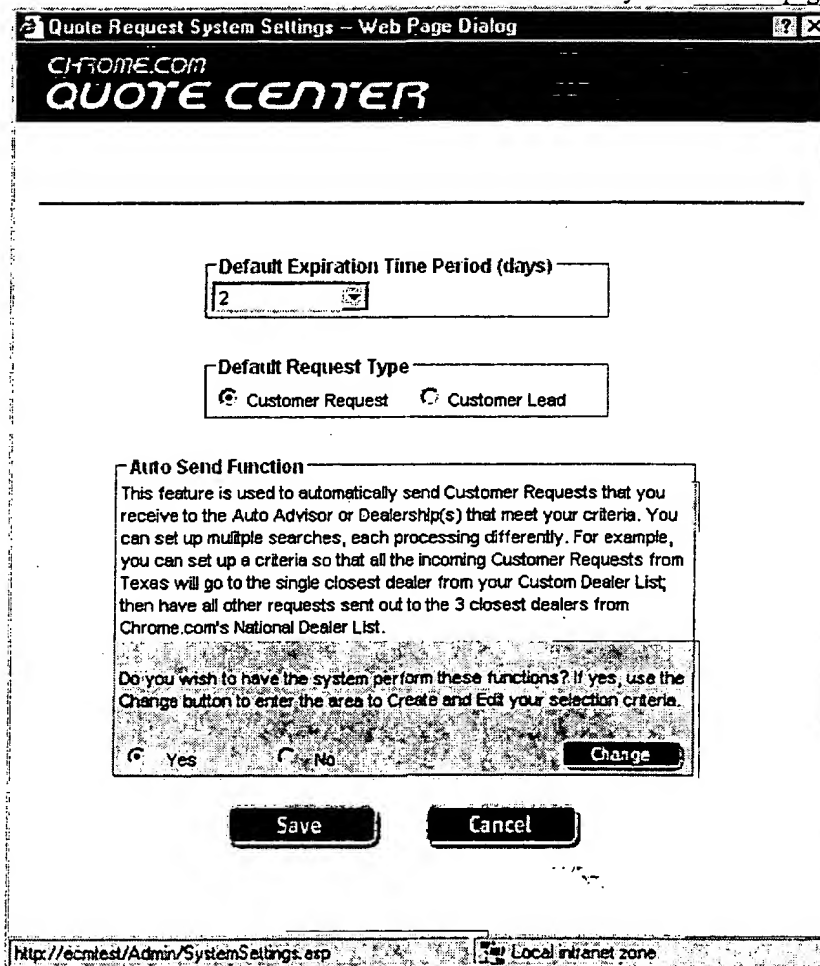
There are three section to System Defaults: Default Expiration Time Period (days), Default Request Type and Auto Send Function.

- **Default Expiration Time Period (days)**, the number set here will determine when the Customer Requests will expire.
- **Default Request Type**, this setting determines if the Request is sent as a Customer Request or as a Customer Lead.
- **Auto Send Function**, this function is used to send a Customer Request automatically to the Auto Advisor or Dealerships.

There are three buttons on the System Defaults page: Change, Save and Cancel.

- **Change**, allows you to view and edit you Auto Send features.
- **Save**, returns to Admin tools and saves the changes made.
- **Cancel**, returns to Admin Tools without saving changes.

System Defaults page



Quote Request System Settings - Web Page Dialog

CHROME.COM
QUOTE CENTER

Default Expiration Time Period (days)

2

Default Request Type

☒ Customer Request ☐ Customer Lead

Auto Send Function

This feature is used to automatically send Customer Requests that you receive to the Auto Advisor or Dealership(s) that meet your criteria. You can set up multiple searches, each processing differently. For example, you can set up a criteria so that all the incoming Customer Requests from Texas will go to the single closest dealer from your Custom Dealer List; then have all other requests sent out to the 3 closest dealers from Chrome.com's National Dealer List.

Do you wish to have the system perform these functions? If yes, use the Change button to enter the area to Create and Edit your selection criteria.

☒ Yes ☐ No

http://ecmtest/Admin/SystemSettings.asp Local intranet zone

In the **Default Expiration Time Period (days)** section, select a value from the drop down menu to reflect the number of days until a Customer Request becomes expired. Or enter a custom value not listed in the drop down menu by selecting Custom Setting, this will automatically expand this section to a second field “**Enter number of days**” type in the Custom number of days preferred.

The **Default Request Type** section allows you to determine if the Request will be sent as a **Customer Request** sending the Affinity information or a **Customer Lead** sending the Customer information to the dealer. Click the option of preference.

The **Auto Send** section is used to automate the function of sending Customer requests to a Dealership or an Auto Advisor, that meets the criteria determined in the setup portion. Auto Send has the functionality to perform multiple searches each processing differently. For example, you can set up a search Filter so that all the incoming Customer Requests from a specific state will go to the single closest dealer from your Custom Dealer List; and all other requests set out to the closest dealers from Chrome.com’s National Dealer List. The **default** for the Auto Send Function is **NO**. To select the Auto Send function, **click** the **Yes** option, and the Auto Send Default page will automatically be displayed. Or, if you have previously selected Auto Send **click** the **Change** button to enter the setup.

After the selections are made **click** the **Save** button to save and return to the Admin Tools page, or **click** the **Cancel** button to return to the Admin Tools page without saving. Or **click** the **Change** button to enter the Auto Send setup section.

Auto Send

There are three sections to Auto Send: Current Auto Send Search Criteria, Auto Send Global Values and No Recipients Meet Criteria.

- **Current Auto Send Search Criteria**, in this section you determine the search criteria, State, Manufacturer Line and Send To. Also a list of existing criteria is displayed.
- **Auto Send Global Values**, this section determines the number of dealers a request will be sent to dependant on the type of request it is (Customer Lead or Customer Request).
- **No Recipients Meet Criteria**, this section determines what action will be taken if no dealers meet the required criteria.

The **Current Auto Send Search Criteria** section is used to set up search Filters. There are three buttons in this section: Create, Go and Trash Can.

- **Create**, this button displays the Setup pages for creating a new Auto send search criteria.
- **Go**, this button automatically displays the specific search filter for viewing and modifying.
- **Trash Can**, this button will remove a specific search filter.

Auto Send screen

Auto Send - Web Page Dialog

CHROME.COM
QUOTE CENTER

Auto Send

Current Auto Send Search Criteria

Create

Edit	Name	Send To	Remove
	Alexis/Acura/50	Dealer(s)	
	Georgia/AM/25	Dealer(s)	
	ALL/EMV/NA/100	Dealer(s)	
	ALL/NA/100/1M	Dealer(s)	
	American vehicles	Dealer(s)	

(1-5) of 5 records

Auto Send Global Values

These values apply globally to all filters. As you set up a specific filter, you will be asked to answer the question of 'type' of request to send the dealers. The type of request will be as a *lead* or *customer request*.

• Dealership(s)

o Send to: dealers for filters of type *Lead*

o Send to: dealers for filters of type *Customer request*

No Recipients Meet Criteria

☐ Do not send it. Place it in my inbox. I will manually send it.

☒ Send it if at least dealers were found. I will re-send it later to more if needed. If it can't find at least 1 dealers, do not send it and place in my inbox. I will manually send it.

Microsoft Word Chrome.com

Click the **Create** button to enter the Auto Send Search Criteria Setup.

Note: If you already have 5 filters setup a message will be displayed "There is a maximum of 5 criteria filters allowed. Please edit or delete an existing filter." Click the **OK** button.

The Auto Send Setup Page 1 has three sections: State, Manufacturer Line and Send To.

- **State**, use this option to set the State (s) to search for a Customer Request.
- **Manufacturer Line**, use this option to set the Manufacturer Line (s) to search for a Customer Request.
- **Send To**, this option allows you to select where the Customer Request is sent.

There are two buttons on the Auto Send Setup Page 1 and 2: **Next** and **Close**

- **Next**, click to enter further search criteria.
- **Close**, click to return to the Auto Send main page, without saving changes.

Auto Send Setup Page 1

Auto Send Setup - Page 1 -- Web Page Dialog

CHROME.COM
QUOTE CENTER

Auto Send Setup Page 1

State
For the Customer Requests coming from the state(s) of: ☒ All States ☐ Select State(s)

Alabama
Alaska
Arizona
Arkansas

Use your Ctrl key to select multiple states.

Manufacturer Line
For the Customer Requests for Manufacturer Line(s) of: ☒ All Lines ☐ Select Line(s)

ACCA
All Rates
All General
Any

Use your Ctrl key to select multiple manufacturers.

Send To
Send Customer Requests to:

Next Close

Microsoft Word Chrome.com

The **State** section allows you to determine if the Customer Request will be sent to a specified recipient in **All States** or select specific States. To select specific states click the **Select State (s)** option, use the scroll bar to locate the specific state (s). If multiple states are required press the **<Ctrl>** key while you click on the state (s) desired.

The **Manufacturer Line** section allows you to determine which Manufacturer Lines will be included in the Customer Request search. **All** Manufacturer Lines can be selected or a specific Line (s), if multiple Lines are required press the **<Ctrl>** key while you click on the preferred Manufacturer Line.

The **Send To** section is dependent upon if your institution is an Affinity or HUB. If the sending organization is an Affinity the Customer Request can be sent to a Dealership or Auto Advisor (commonly a HUB). However, if the sending organization is a HUB there is NO option, the Customer Request is sent to a Dealership.

After the criteria is selected on Auto Send Setup Page 1 click the **Next** button to advance to Auto Send Setup Page 2. Or click the **Close** button to return to the Auto Send Main Page, without saving changes.

There are four sections on the Auto Send Setup Page 2: Auto Send Information [Read Only], Send the Customer Request as a, Select Dealer List and Maximum Distance Selection.

- **Auto Send Information [Read Only]**, this section displays criteria entered on the Auto Send Setup Page 1.
- **Send the Customer Request as a**, this section allows you to determine if the Customer Request will be sent as a Lead or a Quote Response.
- **Select Dealer List**, allows you to select the National Dealer List or your Custom Dealer List for the search criteria.
- **Maximum Distance Selection**, select the maximum acceptable distance from a Customer to a Dealership.

Auto Send Setup Page 2

Basic Auto Send Search Criteria - Page 2 - Web Page Dialog

CHROME.COM
QUOTE CENTER

Auto Send Setup Page 2

For Customer Requests that are being sent automatically to DEALERSHIPS.

Auto Send Information [Read-Only]

For All State(s) For All Manufacture Line(s)

Send the Customer Request as a:

If you choose Lead, this means you do not want to receive electronic dealer responses into Quote Center. If you choose Quote Response, this means you expect dealers to send back quotes and the customer information will not be sent to the dealer unless you accept their quote.

☒ Lead ☐ Quote Response

Select dealer list:

Choose from which dealer list you wish to run this Auto Send Search Criteria through.

☒ National Dealer List ☐ Custom Dealer List

Maximum Distance Selection:

What is the maximum acceptable distance from the Consumer to the Dealership?

50 Miles

Save Cancel

Microsoft Word Chrome.com

The Auto Send Information [Read Only] section will display the number of States and Manufacturer Lines selected on the Auto Send Setup Page 1. To modify this section click the **Cancel** button to return to the Auto Send Main screen and click the **Create** button, repeat the procedure for Auto Send Setup Page 1.

The **Send the Customer Request as a**, section allows you to send the request as a Lead and an electronic dealer response will not be returned to Quote Center. Or a Quote Response can be selected and the dealers quotes will be sent to Quote Center and the Customers information will not be sent to a dealer unless a quote is accepted.

- **Lead**, customer information is sent to dealership and an electronic response will not be sent to Quote Center.
- **Quote Response**, dealerships will send an electronic response to Quote Center and the Customer information is only sent when there is an acceptance.

The **Select Dealer List**, section gives you the option to run the Auto Send search criteria through the National Dealer List or more locally through your Custom Dealer List.

- **Custom Dealer List**, customized list of dealers commonly used by your institution.
- **National Dealer List**, use to add dealer recipient (s) from the National List. (National Dealer List has approximately 20,000 Dealers available for selection, located nation wide)

The **Maximum Distance Selection**, allows you to select an acceptable distance from the Customer to the Dealer. Use the drop down menu to select the desired distance. The available options in miles are 25, 50, 75, 100, 250 or Does Not Matter.

After the criteria is selected on page 2 click the Save button, this will display a "Save Auto Send Search Criteria Filter" screen. There are three sections on this screen: Save NEW Auto Send Search Criteria Filter As, Basic Information and Advanced Information.

- **Save New Auto Send Search Criteria Filter**, this function saves the search filter with a specific name.
- **Basic Information**, lists the criteria selected on Auto Send Setup Page 1.
- **Advanced Information**, lists the criteria selected on Auto Send Setup Page 2.

Save Auto Send Search Criteria Filter

Auto Send Search Criteria - Web Page Dialog

CHFCORE.COM

QUOTE CENTER

Save Auto Send Search Criteria Filter

Save NEW Auto Send Search Criteria Filter As:

Type in a name to save the NEW Criteria Filter as; or choose an existing Criteria Filter from the list to overwrite with the specifications shown.

Name:

Basic Information

State(s): All States

Manf. Line(s): All Vehicle Lines

Send To: Dealer(s)

Advanced Information

Lead/Quote: Quote

Dealer List: Custom

Distance: 50 miles

<http://ecmtest/Admin/AutoSendSearchCriteria.asp?Action=1> Local intranet zone

To type a "New" name for a Filter **press** the <TAB> key or **click** once in the **Name field**. Type a specific name and **click** the **Save** button. Or select a previously saved Filter name (that filter will be over written) from the drop down list and then **click** the **Save** button, this returns you to the Auto Send Main Page.

In the **Auto Send Global Values** section the values entered are Global values and apply to all filters. Use the drop down menus to select the number of dealers a Customer Lead or Customer Request will be sent to. The options in the drop down men for Customer Lead are 1 to 5, and for Customer Requests are 1 to 15. A custom value may not be entered in this section.

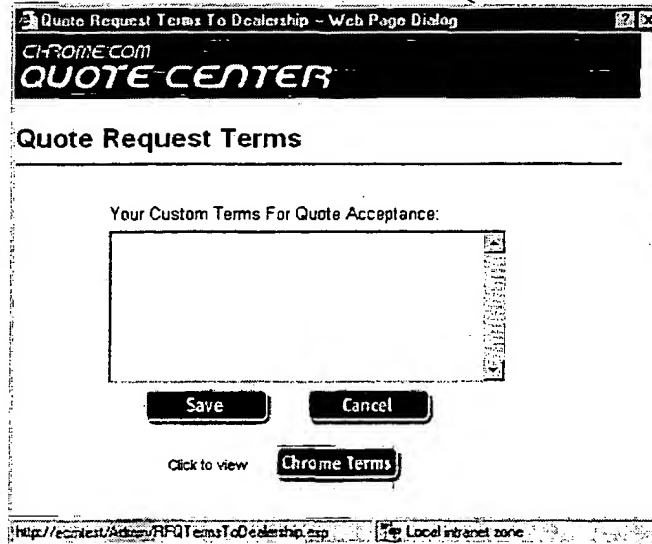
In the **No Recipients Meet Criteria** section you have the option to "Do not send it. Place it in my inbox. I will send it." Or " Send it if at least X dealers were found. I will re-send it later to more if needed. If it can't find at least X dealers, do not send it and place in my inbox. I will manually send it." Click the option of preference.

Once all the criteria has been selected in the Auto Send section **click** the **Close** button to return to the Quote Request System Settings page. Next **click** the **Save** button to Save all settings and return to the Admin Tools Page. Click the icons on the Tool bar to access other areas of Quote Center see the specific chapter of the User's Guide for instructions of use.

Terms

To verify and update your Customer Request Terms click the  button, **Terms** text or the **icon** on the Admin Tools page.

Quote Terms screen

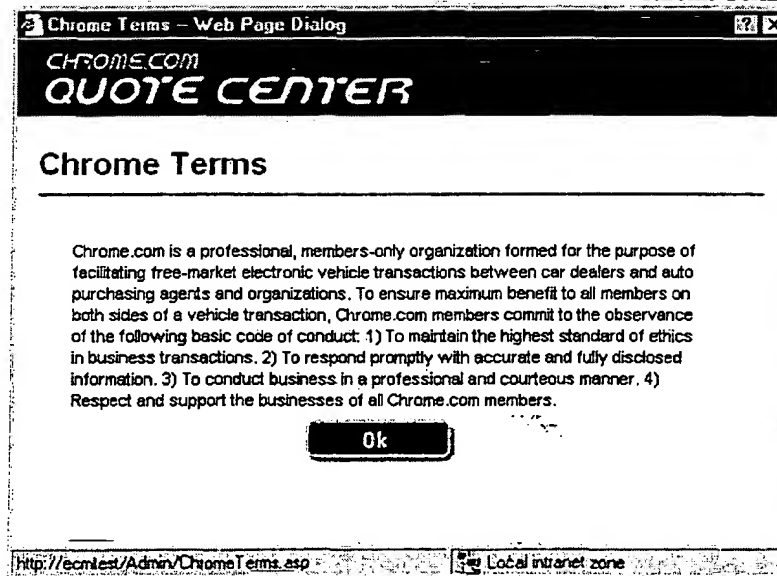


The screenshot shows a web browser window titled "Quote Request Terms To Dealership - Web Page Dialog". The header bar displays "CHROME.COM" and "QUOTE CENTER". The main heading is "Quote Request Terms". Below this, the text "Your Custom Terms For Quote Acceptance:" is followed by a large text input field. At the bottom of the input field is a vertical scroll bar. Below the input field are two buttons: "Save" and "Cancel". Below these buttons is a link that says "Click to view" next to a button labeled "Chrome Terms". The status bar at the bottom shows the URL "http://ecmtest/Admin/RQTermsToDealership.asp" and "Local intranet zone".

Type in your Custom Terms for Quote acceptance with a maximum of 254 characters. There are three buttons on the Quote Request Terms screen: Save, Cancel and Chrome Terms.

- **Save**, return to Admin Tools and save changes
- **Cancel**, return to Admin tools without saving changes.
- **Chrome Terms**, click to view the Chrome.com Membership Rules.

Chrome Terms



The screenshot shows a web browser window titled "Chrome Terms - Web Page Dialog". The header bar displays "CHROME.COM" and "QUOTE CENTER". The main heading is "Chrome Terms". Below this, the text reads: "Chrome.com is a professional, members-only organization formed for the purpose of facilitating free-market electronic vehicle transactions between car dealers and auto purchasing agents and organizations. To ensure maximum benefit to all members on both sides of a vehicle transaction, Chrome.com members commit to the observance of the following basic code of conduct: 1) To maintain the highest standard of ethics in business transactions. 2) To respond promptly with accurate and fully disclosed information. 3) To conduct business in a professional and courteous manner. 4) Respect and support the businesses of all Chrome.com members." At the bottom of the text is an "Ok" button. The status bar at the bottom shows the URL "http://ecmtest/Admin/ChromeTerms.asp" and "Local intranet zone".

Click the OK button to return to the Quote Request Terms screen.

Quote Center Tool Bar



- **Admin Tools**, used to update your information, maintain your users, and set your terms and default information. Must have Admin Rights to access this section of Chrome.com.
- **Customer Request**, this folder allows you to create or update Customer Requests and send them to dealers. Or delete the Customer Request.
- **Dealer Responses**, this folder allows you to analyze incoming Dealer Responses, and send acceptances back to dealers.
- **History**, deleted, accepted and expired Customer Requests and dealer responses reside here.
- **Contact Us**, function to send questions, comments or problems directly to Chrome Data Corp Customer Support.
- **Log Out**, exit Chrome.com Quote Center. A "Thank You" screen will appear. To close click **F**ile then **E**xit. Or Ctrl+Q.

See the Table of Contents, page 1 of this User's Guide for specific sections of Quote Center.

Glossary of Terms

Accept: will send the acceptance to the specific Dealer Response.

Add Dealer: used to add dealers to your Custom Dealer List.

Admin: an agent that has administrative rights.

Admin Tools: used to update your information, maintain your users, and set your terms and default information. Must have Admin Rights to access this section of Chrome.com.

Advanced Information, lists the criteria selected on Auto Send Setup Page 2.

Affinity: institution that provides PC Carbook and or Web Carbook, for ^{its customers} ~~clients~~ to submit a vehicle request to Quote Center. An Affinity would be a Bank, Credit Union, etc.

All: will display all your institution information: Name, Address and Agent.

Auto Send Function: this function is used to send a Customer Request automatically to ^{any} ~~the~~ Auto Advisor or Dealerships.

Auto Send Global Values: this section determines the number of dealers a request will be sent to dependant on the type of request it is (Customer Lead or Customer Request).

Basic Information: lists the criteria selected on Auto Send Setup Page 1.

Cancel: return to the previous screen or home page, without attaching any changes.

Car Icon: used to view the Makes of vehicles carried by a dealership.

Change: use to review or modify settings.

Chrome.com: is a password protected Extranet comprised of a desktop vehicle configuration module (PC Carbook) for vehicle information, a desktop notification tool (JumpStart), an Internet based RFQ communication Module (Quote Center) and a Internet based dealership response tool (Response Center).

Chrome Terms: Non editable Chrome.com member terms (user agreement).

Clear: used to clear all the information entered.

Close: returns you to the previous screen or page.

Column Header: descriptive title of column, with attached sort functionality.

Company Info: information entered in relation to your Company, name, address etc...

Compare: will display a comparison report of the Customer Request and the specific Dealer Response.

Contact Us: function to send questions, comments or problems directly to Chrome.com Customer Support.

Create: function used to enter new criteria in the system.

Current Auto Send Search Criteria: in this section you determine the search criteria, State, Manufacturer Line and Send To.

Custom Dealer List: customized list of dealers commonly used by your institution.

Customer Info: information entered in relation to a customer, name, address, phone, etc.

Customer Lead: this function sends the customer information and the institution information to the dealer and the dealer will contact the customer directly.

Customer Request: this function when selected will send the financial institution information that is determined in Admin Tools. It will send the institution name only, or all financial institution information, or an anonymous request to dealers, which returns the quote back to the financial institution, this requires a Response Center to be used to reply back.

Dealers: function used to view the Dealers that were sent the Customer Request.

Dealer List: customized list of dealers commonly used by your institution.

Dealer Responses: your Dealer Response folder is where you analyze incoming Dealer Responses and send acceptances back to dealers.

Default Expiration Time Period (days): the number set here will determine when the Customer Requests will expire.

Default Request Type: this setting determines if the Request is sent as a Customer Request or as a Customer Lead.

Delete: this function is used to remove existing records.

Details: click to view a printable report of the Customer Request vehicle spec.

Filter List: use to filter your Customer Dealer List with the criteria entered. The Zip Code Search or the City/State Search must be used in conjunction with this filter. A valid 5 digit US zip code is required to create a proximity search.

First: function used to view the "First" record in a table with multiple listings.

Go: this function will expand the selected record for editing, details or viewing.

Help: Content sensitive assistance.

History: deleted, accepted and expired Customer Requests and dealer responses reside here.

HUB: is the purchasing agent for the consumer purchasing a vehicle, commonly an Auto Broker.

Institution: pertaining to your specific company.

JumpStart: is a mechanism for notification to Chrome.com customers, of any incoming information into Quote Center or Response Center. It also acts as a desktop organizer for links to any .EXE or web site.

Last: function used to view the "Last" record in a table with multiple listings.

Lead: customer information is sent to dealership and an electronic response will not be sent to Quote Center.

Location Name: your institutions assigned name, entered on the Login screen to gain access to Chrome.com

Log In: a sequence of fields/values, entered to access Chrome.com.

Login Trouble: unable to log into Chrome.com, error entering Location Name, User Name or Password.

Log Out: to exit Chrome.com Quote Center. A "Thank You" screen will appear.

Manufacturer Line: use this option to set the Manufacturer Line (s) to search for a Customer Request.

Name: will display your institution name only on Customer Requests sent to dealers.

National Dealer List: use to add dealer recipient (s) from the National List.
(Dealer List has approximately 20,000 Dealers available for selection, located nation wide)

New: notification of "New" response.

Next: function used to advance to the "Next" sequent record listed.

No Bid: no response received from a dealer.

Non-Admin: an agent that does not have administrative rights (may have read only ability)

None: will send an anonymous Customer Request to dealers.

No Recipients Meet Criteria: this section determines what function will be taken if no dealers meet the required criteria.

Password: sequence of characters required gaining access to Chrome.com.

Previous: function used to return to the "Previous" record listed.

Print: will display a printable report of the Customer Request and all the attached Dealer Responses.

Proximity Search: this function allows the HUB or affinity user of Chrome.com to select a predefined distance from the Customer's zip code they want to search the dealer database on.

Quote Center: is a system that organizes all incoming leads from Web Carbook, and incoming responses from Response Center.

Quote Response: dealerships will send an electronic response to Quote Center and the Customer information is only sent when there is an acceptance.

Ranking: function used by a customer, to list the importance of selected vehicle options.

Remove: used to remove selected dealers from Custom Dealer List.

Response Center: is the system that dealers use to respond to Customer Requests.

Request Details: this function sets the expiration date or a Customer Request, and allows comments to be sent with the request.

Request Terms: the requirements set by your company for quote acceptance.

Required: a field that must be completed to submit information. Commonly flagged with an asterisk (*).

RFQ (Request for Quote): is when the “get a quote” button is selected and the process is completed.

Save: this function writes (saves) any changes made to the specific section of Chrome.com.

Save New Auto Send Search Criteria Filter: this function saves the search filter with a specific name.

Search: used to locate data/information that corresponds/matches criteria entered.

Send To....: this portion of Chrome.com allows you to determine which dealer the Customer Request will be sent to.

Single Click: click once on the controlling mouse button, for right hand users it will be the left mouse button, for left hand users it will be the right mouse button.

Search: used to search on the criteria entered in the Search fields.

Show All: the display of this option is dependent on what section of Chrome.com you are in.
Used to show your entire Dealer List, or to show entire list of all your customers in the search function.

System Defaults: settings that will determine where and how the Customer Requests are sent.

Trash Can: used to delete and move the Customer Request and all responses attached to the History folder.

Underlined Text: in Chrome.com is Hypertext, and will take you to another screen or page.

Unlock: used to unlock a checked out Customer Request.

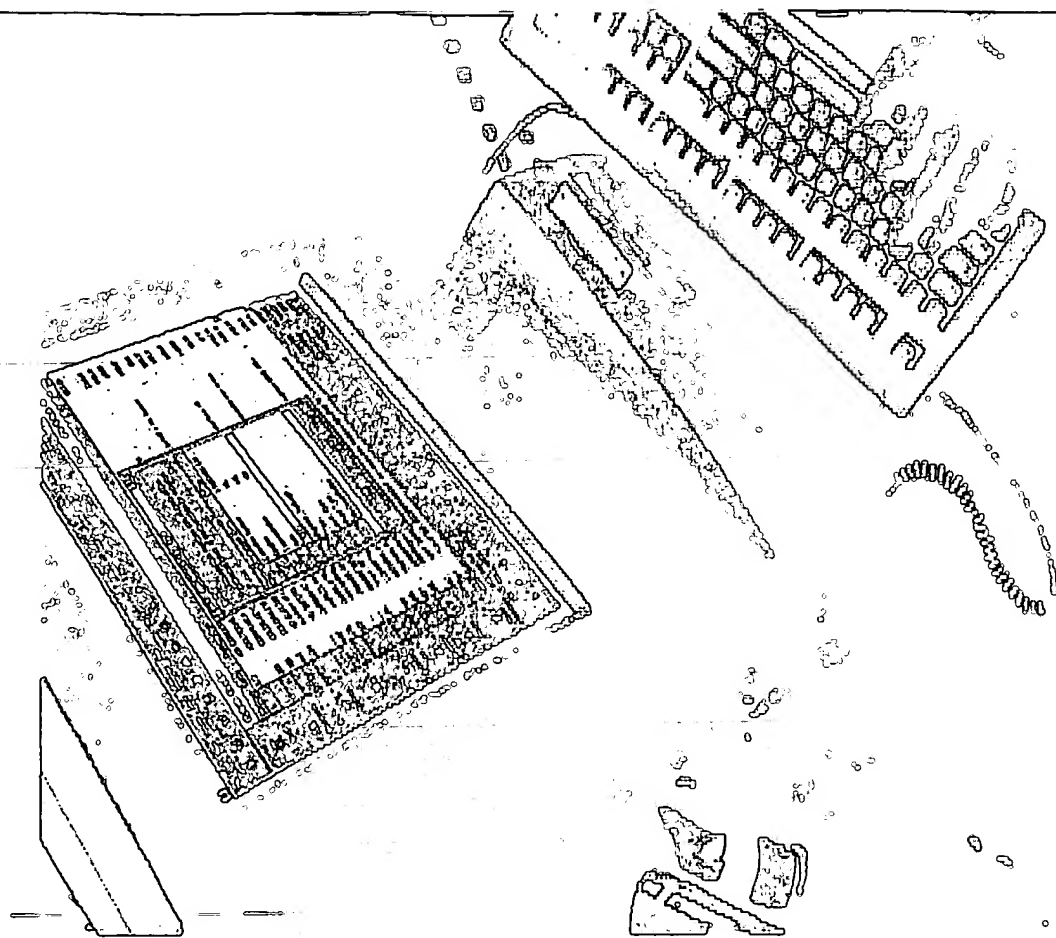
User Info: this is the section of Chrome.com that your administrative controller creates or modifies the individual user records.

User Name: system login name assigned to individuals, by administrative personnel at your institution.

Vehicle Info: criteria entered into PC Carbook, to configure a vehicle.

“Wild Card” search: partial information may be entered for the system to retrieve possible matches.

CHROME.COM PC CRIBBOOK[®] FOR WINDOWS



CHROME EXTRA

1000 1st St.
New York, NY 10001

Phone: 212-430-4300

Fax: 212-430-4300

support@chrome.com

chrome@chrome.com

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Getting Started Guide

Key Information

Online Help

Click HELP to find descriptions of dialog boxes, their contents, and procedures. You can access HELP from:

- The HELP menu
- The ? icon on the Toolbar
- HELP buttons when they appear on screen

Customer Support

Questions about installation, training, or software? Please contact us at 800-937-3661 or email support@chrome.com. Please have your Customer ID number ready when you call or include it in email messages.

- Customer support is available Monday-Friday 6 am to 5 pm Pacific time at no charge.
- Free telephone training is available Monday-Friday 7 am to 4 pm Pacific time. Please call 800-937-3661 to schedule a training time.

Chrome Data Corporation

Phone: 800-937-3661

Email: support@chrome.com

Internet: www.chromedata.com



Welcome to PC Carbook

For Information on...

Hardware Requirements 2

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See page....

HARDWARE REQUIREMENTS:

Desktop or Stand-alone PC

Covers Most Users

- Pentium 90
 - 32 MB RAM
 - CD-ROM Drive
 - 150 MB available hard drive space*
 - Windows 95, 98 or NT 4.0
 - Mouse or pointing device
 - VGA 256 color monitor
 - Modem access
- ### Network File Server
- CD-ROM Drive Access
 - 100 MB available hard drive space*
 - Modem access
 - Access to a Workstation with Windows 95, 98 or NT 4.0.

Network Workstation

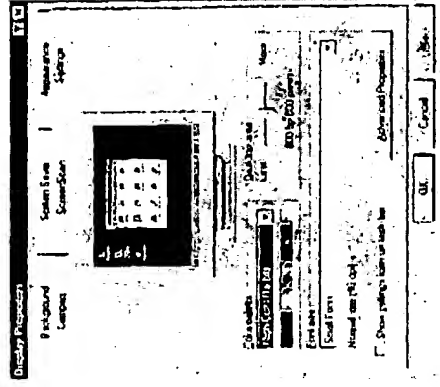
- Pentium 90
- 32 MB RAM
- 20 MB available hard drive space
- Windows 95, 98 or NT 4.0
- Mouse or pointing device
- VGA 256 color monitor

- * An additional 100 MB of temporary hard drive space on the local C: drive is required for updates.

OPTIMIZATION:

To get the best out of PC Carbook, we recommend the following display resolution and color settings:

- 800 x 600 pixel Desktop area
- 256 or High Color (16 bit) Color palette



To change your desktop setting, from the Start button select: Settings / Control Panel / Display / Settings. Select the new settings and press OK.

INSTALLATION INSTRUCTIONS:

Installation for Desktop or Stand-alone PC:

- Start Windows.
- Insert the PC Carbook CD.
- Installation should start automatically.

If it does not:

- Go to the START button and select RUN.
- Type D:\setup (or the appropriate CD-ROM Drive letter).
- Click OK.
- Select the components you want to install (PC Carbook, Auto Update System, Chrome.com, Jump Start).
- Select a destination directory. Click NEXT.
- Select a start menu group. Click NEXT.

Covers Most Users

Installing PC Carbook

- Installing this new version of PC Carbook will uninstall your previous version. Select Automatic Uninstall. NOTE: Your CARSAVE files will be moved to the new PC Carbook installation location.
- Select Desktop/Standalone installation. Click NEXT.

Installing the Automatic Update System (AUS)

- Follow the on-screen instructions for installation and for entering your Auto Update System User Name and Password located on the inside front cover of this guide. Click NEXT. (See page 7-8 in this guide for more information and requirements on this tool).
- When prompted, please restart Windows.
- When prompted, enter the License Code and Customer ID located on the inside front cover of this guide.

Installation for Network File Server: -- Step 1

- Start Windows.
 - Insert the PC Carbook CD.
 - Installation should start automatically.
- If it does not:**
- Go to the start button and select RUN.
 - Type D:\setup (or the appropriate CD-ROM Drive letter).
 - Click OK.

- Select the components you want to install (PC Carbook, Auto Update System, Chrome.com, Jump Start).
- Select a destination directory. Click NEXT.
- Select a start menu group. Click NEXT.

Installation for Network File Server: -- Step 2

After installing to the Network File Server, you will need to verify that users have the rights and permissions needed to run PC Carbook. Here are some guidelines:

In \CARBOOK, the user needs to know that the file exists, to read a file, and to execute a program.

- On a Novell system, grant File Scan and Read rights.
- On an NT system, set directory Permissions (type of access) to Read.

In \CARBOOK\MDB, the user needs to know that a file exists, to read a file, to write to a file, to create a file, and to delete a file.

- On a Novell system, grant File Scan, Read, Write, Create, and Delete rights.
- On an NT system, set directory Permissions (type of access) to Change.

In \CARBOOK\NET, the user needs to know that a file exists, to read a file, and to write a file.

- On a Novell system, grant File Scan, Read, and Write rights.
- On an NT system, set directory Permissions (type of access) to Change.

Installation for Network File Server: -- Step 3

Installation for Network Workstation:

- Start Windows
- From the start button, select RUN.
- Browse until you locate the drive and subdirectory on the network file server to which PC Carbook was installed.
- Run netclien.exe.
- If prompted, please restart Windows.

DATA UPDATES:

PC Carbook provides great flexibility for updating your files. Users with Internet access can choose to update their files automatically with the Automatic Update System (AUS); users with limited Internet access can update their files with Internet Updating or our Electronic Updating Service (EUS).

We recommend that you update PC Carbook regularly to guarantee that you have the most current and accurate information. Update files must be loaded in the correct chronological order to be sure that all information is current and accurate. Updates are available weekly.

- **Because of its large size, the complete database should NOT be run for updating purposes unless you are specifically instructed to do so by a Chrome Data Customer Service representative.**

Automatic Update System (AUS)

With AUS, you can set your computer to download weekly updates automatically, guaranteeing that you always have the most timely and accurate data.

To use AUS, you will need all the following loaded on the same PC:

- Internet access
- Microsoft® Internet Explorer® 4.1 or greater
- PC Carbook

To set up AUS

- Double-click the AUS icon on your task bar (lower right-hand corner of screen, next to the time).
- Click on OPEN DIALOG.
- Click on the SETTINGS tab.
- Put a check mark in the box next to ENABLE AUTO UPDATES.
- Choose a day of the week.
- Choose a time of day.
- Click APPLY.

To set user name and password:

- Click on the SECURITY tab.
 - Click on SET USER NAME AND PASSWORD.
 - Enter User Name and Password located on the inside cover of this guide. Note that they are case-sensitive, so be sure to use capital letters where indicated.
 - Confirm password.
 - Click OK.
- To test your connection:**
- Click on the SECURITY tab.
 - Click on TEST CONNECTION.
 - Your test results will appear in the dialog box.

Internet Updating

Step 1

Before starting the updating process, you will need to know the current Data Version loaded on your computer. To find that out:

- From PC Carbook, access the HELP menu.
- Choose ABOUT.
- From Data Info, write down the Data Version and Data Date.
- Exit PC Carbook.

Step 2

- Start your web browser.
- Go to www.chromedata.com/update.
- Enter your User Name and Password, which is located on the inside front cover of this guide.

Option 1: Downloading the update to your hard drive

- Download the update file(s) to your desktop.
- Download every update file that is more recent than the Data Version currently loaded.
(See below for downloading options).
- Do not skip any major revision updates (major revision updates are those ending in .0, such as 14.0).

- Because of its large size, the complete database should NOT be run for updating purposes unless you are specifically instructed to do so by a Chrome Data Customer Service representative.
- Update files must be loaded in the correct order to be sure that all information is current and accurate. It is recommended that you update regularly.
- Exit the web browser when the download is complete.
- Double-click on the UPDATE icon on the desktop.
- If you have more than one update file to add to your system, run the files in date order, with the oldest file first.

Option 2: Downloading the update to a floppy disk so that it can be loaded to another computer.

- Insert a blank floppy disk (3-1/2" HD) in drive A: (or B:, depending on your configuration).
- Download the update file(s), specifying drive A: (or B:) as the destination for downloading.
- Select SAVE.
- Exit the web browser when the download is complete.
- Insert the floppy disk with saved updates into drive A: (or B:) of the second computer.
- Run the saved update file on the second computer. The file itself will know how to locate the PC Carbook database on the second computer.
- Again, if more than one update file needs to be updated, run the files in date order on the second computer, with the oldest file first.

Note: Because of its large size, the complete database will not fit on a single floppy. We recommend that you do NOT run the complete database for updating purposes unless you are specifically instructed to do so by a Chrome Data Customer Service representative.

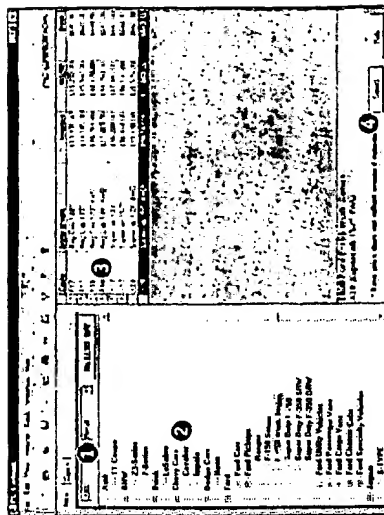
Electronic Updating Service (EUS)

As a convenience to current EUS customers, the EUS program is included on this CD. To install the EUS program:

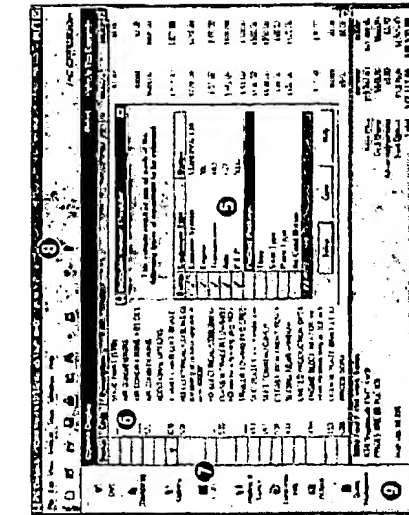
- Open Windows Explorer.
- Open the CD drive (usually D:)
- Open the EUS folder.
- Double click on install.

For more information about this service or to replace your EUS Getting Started Guide, please call 800-937-3661.

BUILDING A VEHICLE IN PC CARBOOK:



- 1 Choose Vehicle Model Year
- 2 Choose Make and Model
- 3 Choose Style
- 4 Click on Select

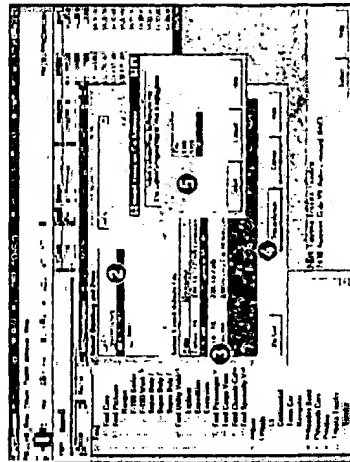



- 5 Proceed through Orderable Vehicle Checklist (OVC)
- 6 Select Free Flow Options or modify vehicle option selections
- 7 Select Interior/Exterior Colors
- 8 Print a report, Save the vehicle for future retrieval, Close the vehicle, Spec another vehicle, or Exit
- 9 View...

- Comparison Report
- Standards
- Options
- Color Charts
- Technical Specs
- Consumer Info
- Picture
- Quote Worksheet

...on the vehicle you have selected

RETRIEVING A SAVED VEHICLE IN PC CARBOOK:



- 1 From the File menu, choose Open, or 
- 2 Choose Drive and Directory
- 3 Choose Saved Vehicle File
- 4 Click on Select Vehicle
- 5 Choose the model year the vehicle will be displayed in
- 6 Review any Price / Option changes since last save
- 7 Proceed through Orderable Vehicle Checklist (OVC) if not complete

Files saved in earlier versions of PC Carbook - *both DOS and Windows* - can be retrieved in this version.

Vehicle Toolbar

View detailed information on the vehicle you have selected:

Orderable Vehicle Checklist:	Walks you through the process to complete an orderable vehicle.
Standards:	Displays Standard Equipment.
Options:	Displays Optional Equipment.
Color Charts:	Displays Color choices based on the vehicle and options selected.
Technical Specs:	Displays Technical Specifications such as horsepower, passenger capacity, MPG etc...
Consumer Info:	Displays Consumer Information such as rebates, warranties, etc.
Picture:	Displays exterior picture of vehicle.
Quote Worksheet:	Calculates final selling price.

ADDITIONAL FUNCTIONALITY:

Filtering

PC Carbook lets you choose from a wide range of criteria for your desired vehicle, so you can spec more quickly and efficiently. Filtering can be done for Year, Price Range, MSRP or Invoice Price, Vehicle Type, Drive Train, Transmission, and Number of Seating Positions.

1. To activate the filter function, click on FILTERS OFF.
2. Select from among the following criteria, depending on your needs.
 - Year
 - Price range
 - MSRP or invoice price
 - Vehicle type (passenger car, truck, van, etc.)
 - Vehicle sub-type (if applicable)
 - Drive train (4WD, AWD, etc.)
 - Transmission (automatic, manual)
 - Number of seating positions
3. Click on APPLY FILTERS.
4. To clear one filter and begin another, click on CLEAR FILTER.
5. To remove the filter function from your screen, click on FILTERS ON.

To Export a Spec'd Vehicle to a File or Email Message

With PC Carbook 3.0, you can export or print an open vehicle description to a .TXT file for use in other .TXT compatible applications, like email.

1. Open or spec a new vehicle.
2. Choose FILE/PRINT or click on the Print icon in the toolbar.
3. Choose desired reports.
4. Choose EXPORT TO FILE.
5. Choose the location where you want to store the file.
6. Choose OK.

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(c). **Governing Law/Forum.** This Agreement shall be governed by the laws of the State of Oregon, and shall inure to the benefit of the Licensor, its successors, administrators, heirs and assigns. The Parties agree that Clackamas County in the State of Oregon shall be the proper forum for any action brought under this Agreement.

(d). **Successors/Assignees.** This Agreement shall be binding on Licensee's permitted successors and assigns.

(e). **Attorneys Fees.** If any litigation is brought to enforce, or arises out of, this Agreement or any term, clause, or provision hereof, the prevailing party shall be awarded its reasonable attorneys' fees together with expenses and costs incurred with such litigation, including necessary fees, costs, and expenses for services rendered, as well as subsequent to judgment in obtaining execution thereof.

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Pull Down Menu Options

File

- New
- Open
- Close
- Save
- Copy Vehicle to Clipboard
- Weblinks
- Export to File
- Printer Setup
- Exit/Return to Chrome.com

Edit

- Customer Information
- Clear Selected Options
- User Defined Options
- Find
- Find Again

View

- Descriptions
- Filter Selection
- Custom Makes
- Effective Price Date
- Price Breakdown
- Vehicle Selector
- Selected Options
- Whodunit
- Option Price Variations
- Differences from File
- Toolbars
- Option Status Legend

Vehicle

- Orderable Vehicle Checklist
- Retail/Fleet
- Standard Equipment
- Optional Equipment
- Color Selection
- Technical Specifications
- Rebates
- Warranty
- Picture
- Order Worksheet
- Quote Worksheet
- Customize Quote Worksheet

Tools

- Comparison Report
- Override Configuration Logic
- User Settings
- Price Settings
- Password Control

Help

- PC Carbook Help Topics
- Search for Help On...
- How to Use Help
- What's New...
- About

Updating PC Carbook

- Start your Web browser.
- Go to <http://www.chrome.com/updates>
- Enter user name and password.
- Download the most recent update file to the desktop.
- Double click the file on the desktop to run the update.

Note: See Editing Starter Guide for additional updating options.

Customizing

PC CARBOOK

Price Display

Customize price display on your reports.

- From the Tools menu... select Price settings.
- Select Column 1 or 2.
- Use the down arrows to modify the price display.
- Save Settings Now (changes default settings) or OK.

Company Information

Add your company name to reports.

- From the Tools menu... select User Settings.
- Select Company tab, and enter your company information.
- Select Save Settings Now (changes default settings) or OK.

General Settings

Allows you to control basic program operations.

- From the Tools menu... select User Settings.
- Select User Path to save vehicle to another directory.
- Select drive and directory.
- Note: ✓ shows selected General Settings.

Customer Information

Add customer's name, address and phone number to reports.

- From the Edit menu... select Customer Information.
- Enter Customer Information, click OK.
- Note: You may also edit Customer Information from the Report Set-up.

How To Contact Us

PHONE: 800-837-3661

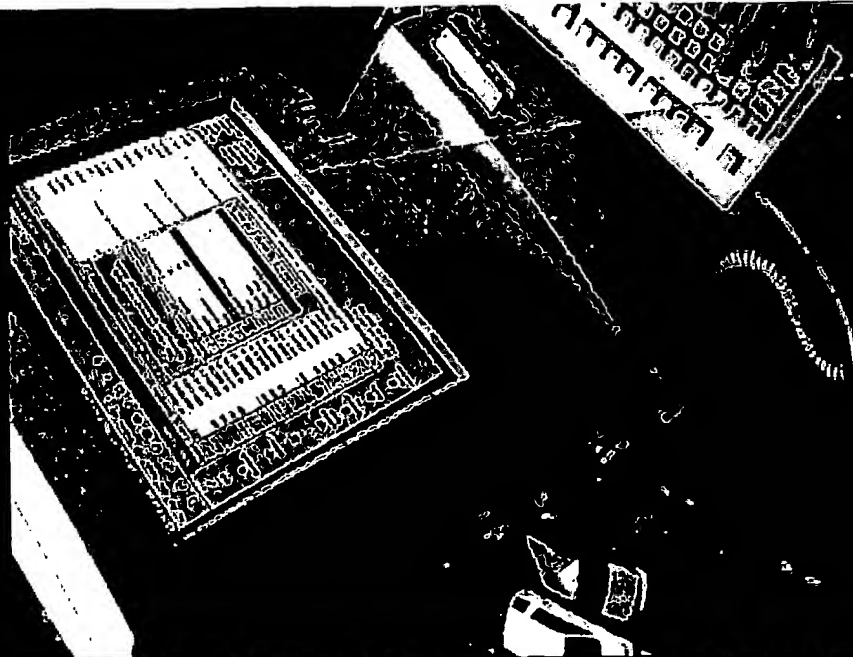
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CHROME DATA
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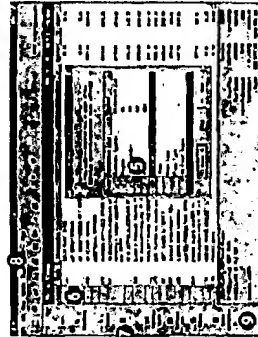
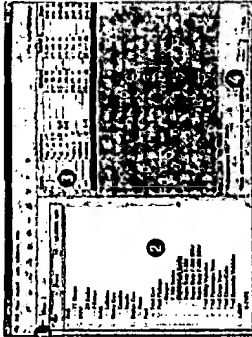


Quick Reference Card

Building a vehicle in PC Carbook

New Vehicle

Building a New Vehicle



- 1 Choose Vehicle Model Year.
- 2 Choose Make and Model.
- 3 Choose Style.
- 4 Click on Select.
- 5 Proceed through Orderable Vehicle Checklist (OVC).
- 6 Select Free Flow Options or modify vehicle option selections.
- 7 Select Interior/Exterior Colors

- 8 Print a report, Save the vehicle for future retrieval, Close the vehicle, Spec another vehicle, or Exit

You've just built a complete and orderable vehicle in PC Carbook. Here's what else you can do!

View...

- Comparison Report
- Standards
- Options
- Color Charts
- Technical Specs
- Consumer Info
- Picture
- Quote Worksheet

...on the vehicle you have selected

PC Carbook Technical Support

800-937-3661

System Toolbar

- New Vehicle
- Retrieve Saved Vehicle
- Close Vehicle
- Save Vehicle
- Print Reports
- Copy Vehicle to Clipboard
- Find
- Toggle Between Selector and Options
- Comparison Report
- Filter Selection
- Legend
- Application Help

Vehicle Toolbar

- Orderable Vehicle Checklist (OVC)
- Standards
- Options
- Color Charts
- Tech Specs
- Consumer Info
- Picture
- Quote Worksheet

Graphic Legend

- Selected Option
- Included at no extra Cost
- Excluded by another option
- Required by another option
- Upgraded or replaced by another option
- Price varies based on options selected

PC CARBOOK FEATURES

Comparison Report

Compare 2 or more vehicles at the same time.



- 1 If you have two or more vehicles open, you can compare them. Select *Comparison Report* under the tools menu.

- 2 Choose the vehicles you want to compare.

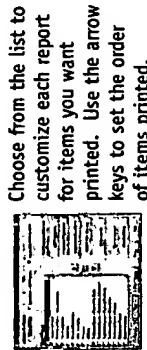
- 3 Choose the features you want displayed under the categories tab.

- 4 Print your report.

PC CARBOOK FEATURES

Report Generator

Prepare custom PC Carbook reports



Choose from the list to customize each report for items you want printed. Use the arrow keys to set the order of items printed.

For instructions on adding messages to reports, search for help on...

- User Defined Blocks
- Custom messages

PC CARBOOK FEATURES

Vehicle Toolbar

View detailed information on the vehicle you have selected:

Orderable Vehicle Checklist: Walks you through the process to complete an orderable vehicle.

Standards: Displays Standard Equipment.

Options: Displays Optional Equipment.

Color Charts: Displays Color choices based on the vehicle and options selected.

Technical Specs: Displays Technical Specifications such as horsepower, passenger capacity, MPG etc...

Consumer Info: Displays Consumer Information such as rebates, warranties, etc.

Picture: Displays exterior picture of vehicle.

Quote Worksheet: Calculates final selling price.

Retrieving a saved vehicle in PC Carbook

Saved Vehicle

- 1 From the File menu, choose Open, or

- 2 Choose Directory and Drive.

- 3 Choose Saved Vehicle File.

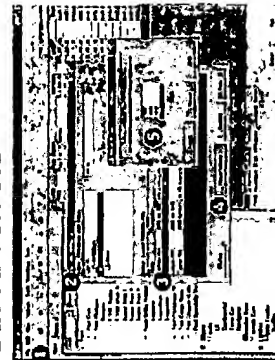
- 4 Click on Select Vehicle.

- 5 Choose the model year the vehicle will be displayed in.

- 6 Review any Price/Option changes since last save.

- 7 Proceed through Orderable Vehicle Checklist (OVC) if not complete.

Retrieving a Saved Vehicle



RESEARCH

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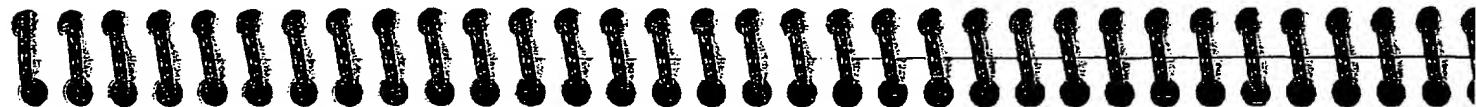
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Client Support

When you become a licensed user of PC Carbook, you get more than just the country's #1 PC-based vehicle pricing service.

You also get the expertise of our skilled client support team, available to help you with program training and many other PC Carbook related issues.

1-800-937-3661

If you'd like a phone walk-through of the software, call our client support team right away.

If you're a proficient PC User and would prefer to discover PC Carbook's powerful features on your own, this guide is for you.

Whenever you have a question, remember help is near, call our toll free number. And, since our in-house vehicle database is updated weekly, be sure to call with any questions about pricing or equipment changes.

Introduction

PC Carbook is the nation's leading computerized vehicle specification and pricing tool for automotive professionals. Chrome is the industry's most trusted name in automotive configuration data.

Fast, reliable, and authoritative, Chrome's PC Carbook packs the critical information you need into a single tool—an intelligent, fact-finding database you can count on.

Chrome and PC Carbook offer total support to close the sale, including:

- ➡ Industry-wide data on all makes, foreign and domestic, new and used
- ➡ Comprehensive information on options, specs, and MSRP, plus invoicing, pricing, warranty, and lease and loan calculations
- ➡ Intelligent, reliable configuration
- ➡ An award-winning client support team, just a toll-free call away

If you have any questions about getting started with PC Carbook, call Chrome's Client Support at 1-800-937-3661.

Once you're familiar with PC Carbook, we're confident you'll join the more than 5,600 dealerships nationwide that rely on PC Carbook as their primary vehicle spec and pricing tool.

Getting Started

PC Carbook hardware requirements:

- ➡ IBM PC/XT/AT, PS/2, portable PC, or compatible computer
- ➡ At least 640 kilobytes of RAM
- ➡ The PC/MS-DOS (Disk Operating System) version 3.0 or later
- ➡ A monochrome or color monitor
- ➡ One 3.5-inch floppy disk drive
- ➡ A hard disk drive with 8 Megabytes of free space

The program also supports this optional equipment:

- ➡ Mouse
- ➡ Serial or parallel printer
- ➡ Modem

Initial Installation

Before you begin to use PC Carbook, you must run the install utility.

The install utility gives step-by-step guidance, and the whole process takes only a few minutes.

Before you run the install utility, you will need the following information:

1. The user and company name(s)
2. Your six-digit Serial Number (located on the inside of this manual's front cover)
3. PC Carbook defaults to the "C" drive for installation. If you plan to use an alternative drive or subdirectory, write it down. (We recommend using the default.)

Run The Install Utility

1. Insert System/Data Disk #1 into the floppy drive
2. At the DOS prompt, type A: and press ENTER. (Or B:)
3. At the DOS prompt, type Install and press ENTER
4. Follow the on-screen instructions

At the time of the first installation, you will be asked if you want to establish a password within PC Carbook.

A password does not limit access to PC Carbook, but it will protect certain features against unauthorized use.

Features that can be restricted are:

- ♦ Competitive Makes
- ♦ Dealer Advertising
- ♦ Price Display Changes
- ♦ Order Worksheet & Link
- ♦ Retail/Fleet Switch
- ♦ Special Equipment
- ♦ Market Class
- ♦ Loan Window
- ♦ Lease Window
- ♦ User Defined Options
- ♦ Monthly Updates
- ♦ Changes to the Password

If you choose to password-protect these features, select Y when prompted. If you choose not to password protect these features, select N.

When installation is complete, the system prompt will display. You're now ready to use PC Carbook.

Call client support toll-free if you have any difficulties during the installation process.

1-800-937-3661

Starting PC Carbook

To start the program:

1. At the DOS prompt, type **C:** and press **ENTER**. (PC Carbook is most commonly installed on the C: drive)
2. At the DOS prompt, type **CD PC** and press **ENTER** (or the directory PC Carbook is loaded in)
3. At the DOS prompt, type **PC** and press **ENTER** to start the program.

The first time PC Carbook is run several license and copyright screens display. As each screen appears and if you agree to the terms of the license agreement type **OK** and press **ENTER**.

Exiting PC Carbook

Exit PC Carbook in either of these two ways:

1. Press **ALT+X** and press **Y**
2. Press **ALT+S**, select the **EXIT** command, press **ENTER**, and then select **Y**

Updating PC Carbook Data

There are three ways to update PC Carbook data.

1. By using the diskettes you receive from Chrome each month
2. By going to Chrome's Web site
3. By going to Chrome's electronic bulletin board, known as a BBS

To use Chrome's Web site, you will need access to the Internet. Once on the Internet, go to www.chrome.com. Click on the "Update PC Carbook" button.

To use Chrome's BBS, you will need special software. To learn more, call Client Support toll-free at:

1-800-937-3661

To use the diskettes you receive from Chrome each month, it's important to know that there are two kinds of updates you will receive.

1. An update that makes small, but important modifications to the data already in your PC Carbook software.
To install this update, select either New or Used Vehicles and press **ALT+S**. From the system menu, select Monthly Updates.

2. The second type of update replaces all the vehicle data stored in PC Carbook. (Periodically, PC Carbook users will be sent a base set of floppy disks which is similar to the original set. This base set contains all program and data files.)

To install this update, follow the instructions in the Installation section of this user guide.

Both kinds of updates are important to ensure that you're using the very latest and most accurate vehicle data, so it's important to perform the updates as soon as the diskettes arrive.

Screen Elements

Menu Bar

At the top of the screen is the menu bar. Available menus appear with the first letter highlighted.

To view a list of available menu options, hold down the **ALT** key and press the letter that matches the first character of your desired menu.

For example, to select the System menu, press **ALT+S**.

To move across the menu bar, use the **RIGHT** and **LEFT ARROW** keys.

To view options within an available menu, use the **UP** and **DOWN ARROW** keys.

To select an option from within an available menu, highlight the option and press **ENTER**.

To exit from a menu without selecting an option, press **ESC**.

Hot Tip!

You can use your mouse to select available menus and options. Point to the desired menu or menu option and click.

Right-click to exit a menu without selecting an option.

Double-click to select a car make.

Place the pointer on the scroll bar and click to scroll up and down the list of car makes.

Screen Window

Just below the menu bar is the screen window. The screen window is where most of PC Carbook's work is accomplished.

You'll use the screen window to select car makes. Additional windows for selecting year, model, equipment, and loan and lease information will appear within the screen window.

Status Bar

At the bottom of the screen is the status bar. The status bar contains reminders of major command keys, such as how to exit a menu or how to get help.

Hot Tip!

You can select certain menu options directly without having to view menus by using hot keys. Hot keys are listed to the right of menu options.

To save your settings, for example, without having to scroll through the System menu, press **F6**.

Help

On-screen help is always available by pressing F1 from anywhere within PC Carbook.

Press F1 twice to display an index of help topics. To display a topic, select it and press ENTER.

In addition, you can move to the Help Index by pressing ALT+H, highlighting a topic, and pressing ENTER.

Press ESC to exit on-screen help.

In addition to the Help Index, there are four topic options within the Help menu. They are:

Glossary. Technical, used vehicle, and financial terms. To go directly to a term, type the first few letters of the term and press ENTER.

Weights. Cargo weights and dimensions for estimating the weight of common commodities hauled by consumers and businesses. To view a description, scroll through the list and press ENTER.

What's New. Programming changes to PC Carbook, as well as vehicle data updates. Type the first few letters of a vehicle make to view updates, or scroll through the list using the mouse or the UP and DOWN ARROW keys.

System Info. Helpful information on the computer and program status.

Setting Preferences

You can arrange certain PC Carbook features according to your own taste and work preferences.

Make Menu

You can customize the list of makes to display only the ones you use. Open the System menu and select Customize Make Menu.

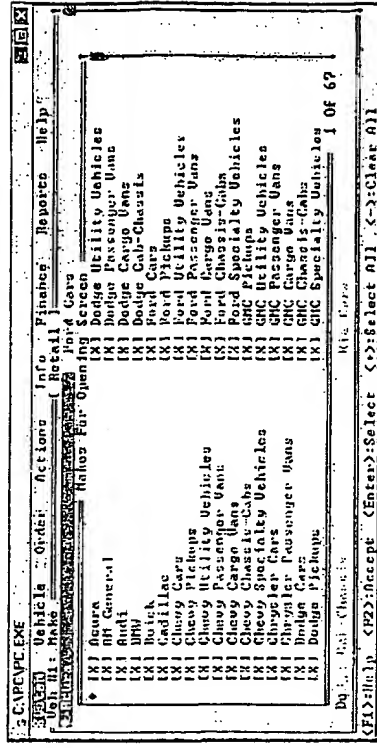


Figure 1. Customize Make Selection Screen

From the list of makes, highlight and select the makes that you want to appear in the screen window. An X will appear in the brackets of selected vehicles.

When finished, press F2 to temporarily accept these makes. For future use, save this setup as your default.

All selected makes will now appear on the opening screen. Non-selected vehicles will be listed under the "Other Makes" heading.

Set Local Advertising

You can set different local advertising values for each manufacturer. Depending on the manufacturer, advertising can be set as a percentage of MSRP minus destination or as a flat rate.

For more information, see the section titled Marketing Adjustments.

Set User-Defined Options By Make

You can add manufacturer information, such as local options, auto accessories, fees or other price variations to all makes or just to specific makes.

Open the System menu and select User-Defined Options. Provide a unique option code, a description, prices, and option type for correct residualization.

When finished, press **F2**. These options can be saved as defaults.

Set Price Display

Several levels for price display are available in PC Carbook. In addition to the typical MSRP and Invoice prices, you can create your own price level to reflect cash flow or a closer representation of vehicle cost.

To set the price display that will appear on the screen and printouts, press **F4**. Once a vehicle is selected, you will see only the price levels for that manufacturer.

If no vehicle is selected before setting the price display, you will be prompted for the manufacturer. See Figure 2 for an example.

Select the column to change and press **ENTER**. Pick the desired price level from the list. The choice of "None" will leave the column blank.

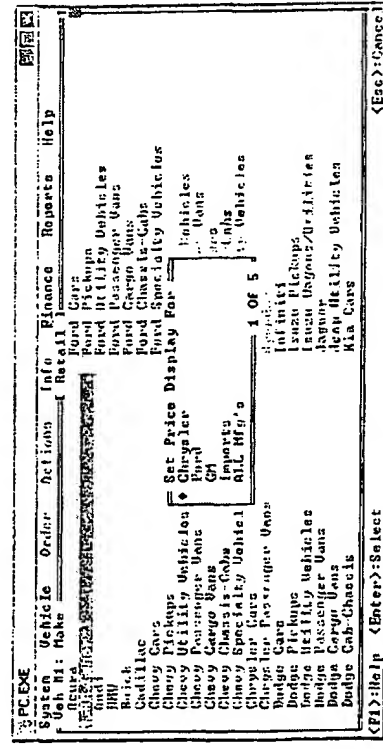


Figure 2. Price Level Dialog Box. NOTE: Different choices for price levels will appear for the fleet and retail modes.

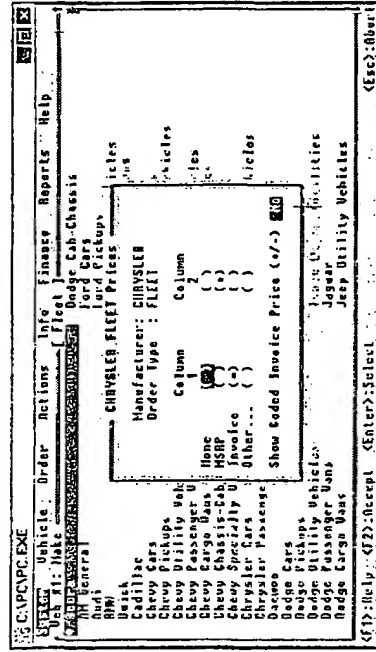


Figure 3. Price Levels for Fleet and Retail

When you select "Other" and add elements to create your own price display, you will be prompted to create a column title.

Use the arrow keys to move to the Custom Name field and enter a descriptive title for that column. Press **F2**.

Remember: The price display you see on the screen is the price that will appear on the printout.

The MarkUp message displays in the bottom left corner of the Body Style or Equipment windows only when two price display columns are displayed.

The value for MarkUp never appears in printouts and is calculated as the percentage difference between the invoice and retail prices as shown below.

$$\frac{100 * (\text{Retail Price} - \text{Invoice Price})}{(\text{Invoice Price})}$$

Saving Defaults

Once established, many changes to the program can be saved as defaults. To save new changes as defaults, press **ALT+S** for the System menu and select **Save Settings**.

Alternatively, use the **F6** hot key to save settings.

Selecting New Vehicles

You are now ready to start through the selection process for new cars and trucks.

Creating a spec is a simple process of selecting a new vehicle Year, Make, Model and Body Style. The first step in the spec process is to determine whether you will use retail or fleet information.

Retail and Fleet Mode

PC Carbook allows you to switch between retail and fleet information on the screen.

This feature allows you to focus on options and pricing specifically for fleet deals and specifically for retail deals without confusion.

Price Display levels, fleet incentives, and special order options are affected by the mode.

To set the mode, select *Retail/Fleet* under the Vehicle menu. Press **ENTER** to switch modes. The current mode is displayed on the screen below the menu bar.

Once selected, the mode can be saved as a default to ensure consistent specs and prices.

Refer to the Advanced Features section for instructions on saving defaults.

Carsave vehicles stored in one mode will be retrieved in the same mode.

Year, Make, Model and Style

To select a vehicle, highlight the desired vehicle and press **ENTER**.

Hot Tip!

Type the first few letters of the item you want to retrieve. The program will automatically take you to the first item that has those letters.

14

Multiple Model Years

After selecting the make, a box will appear on the screen with choices of model year. You may select the current model year or any prior available model year.

The next window displays choices on the model of car. Select the model you want and press **ENTER**.

You will now see a screen like Figure 4. This screen shows all the body styles available for the selected model. The pointer highlights the first selection on the screen. The style code, description, and prices are listed at this level.

As you move up and down the list, information in the bottom half of the screen changes according to the selection highlighted above.

[illegible]

Figure 4. Style Screen

Price information appears at the Body Style level. From this level on, you will see only information specific to the style you pick.

The ESC key moves you back through previous levels.

To select a style, highlight it with the pointer and press **ENTER**.

A menu listing all available equipment for the style you have chosen will appear.

Selecting Equipment

Optional Equipment

Once the Equipment Window appears, we can locate and select all the necessary optional equipment to complete a fully configured vehicle.

There are four ways to find the options you want:

- Complete Vehicle Checklist
 Manufacturers' Option Codes
 Text Description
 Item-By-Item

Complete Vehicle Checklist

After you select a vehicle from the Body Style list, an equipment checklist appears.

This equipment checklist represents equipment required by the manufacturer to create an orderable vehicle. Highlight any item on the list and press **ENTER**.

The program automatically makes the correct selection for that item, and the RPO code will appear to the right.

If more than one selection is possible, you will be led through other choices of compatible equipment. Select from these items to create a minimal set of options for an orderable vehicle.

[illegible]

Figure 5. Complete Vehicle Checklist

The message, ={ Order NOT Complete}= will flash at the bottom of the screen until all equipment requirements have been met.

In the background of the Complete Vehicle Checklist is the list of optional equipment. The Complete Vehicle Checklist will stay on the screen until all required selections have been made, or until you press **ESC**.

Additional options can be selected. To bring the Complete Vehicle Checklist back to verify the completeness of the order, press **SHIFT+F1**.

Option Codes

Type the manufacturer option code and press **ENTER**. PC Carbook will flag the option with a “▲”.

Some manufacturer options require that additional options be added. PC Carbook flags these dependent options with a “»”.

See the example in Figure 6.

Item by Item, Page by Page

You can use the arrow keys to move through the list of options, making selections as options appear.

In the lower right corner of the Equipment window you can see a status message, such as “32 of 121” possible options.

Options that are excluded by previous selections are flagged with the “” symbol. See the example in Figure 8.

```

3 PC EXE
System      Vehicle   Order#   Actions   Info       Finance    Reports   Help
Use #1: Optional Equipment          Retail Invoice MSRP
0 07: 1987 PONTIAC FIREBIRD 4-DOOR SPLIT TRAC 1987 0.00
        BEIGE SEAT, 16" TALLS, BENCH SEAT, YEAR ADJUSTMENT, 2.0 M SLT Plus Quick-Order Pkg)
P -> <<< POINT >>>
+ADD MONTELORE PAINT (STD) 0.00
Code=ONE PAINT **6D Color 191.00
2400 0.00
<<< AIR CONDITIONING >>>
0.00
0.00
0.00
Quick-Order Pkg>
55 of 98

*01 Body: Rm 1508
PELLAS: Quad Cab 139' up
MarShip: 14.5% Effective: 01/07/00
P121210 In CP22 Standard Emble <R00> Prior COLE-DX> Exit

```

Figure 8. Included and Excluded Options

Figure 8, also shows a selection marked with a “☺” symbol. This symbol indicates that the selected option is included at no charge with another option by the manufacturer.

Even though a price is listed in the Price Display columns, these prices have not been added to the totals at the lower right screen. In fact, when printed this option will be listed like this example:

__GL Decor/Equipment Group N/C with 204A

You are not charged twice for this included item.

The “o” symbol may appear next to an option. This symbol signifies that an item has been upgraded since the last dataset.

[illegible]

Figure 6. Required Options

Descriptions

If you don't know the option code for an item, you can locate the item by searching on part of the description.

To search by description, press **F3**. A box labeled Search appears. Type a word that would be likely to appear in the option description.

Figure 7 shows an example of the Search Description box.

System	Vehicle	Order	Nations	Info	Finance	Repovich	Help
Sub H:	Optional Equipment			Retail		Invoice	
104	4-PASSENGER SEATING-inc: flip-fold center console, column shifter					0.00	MSRP 1 0.00
	<<< SEAT TYPE >>>					0.00	0.00
	SE CLOTH FRONT BUCKET SEATS (STD)					0.00	0.00
	<<< PAINT >>>					0.00	0.00
	CLEARCOAT PAINT (STD)					0.00	0.00
	Search for: <u>SEATING 4-PASSENGER SEATING-inc: flip-fold center console, column shifter</u>					0.00	0.00
642						0.00	0.00
242						0.00	0.00
468						0.00	0.00
59C						0.00	0.00
	20 of 35					0.00	0.00

Base	Options	Adv/Adj	Total
17063.00	0.00	0.00	17063.00
550.00	0.00	0.00	550.00
17613.00	0.00	0.00	17613.00

MakeUp : 0.55%

Effective: 11/22/99

Order Not Complete

Figure 7. Search by Option Description

Although P_ was included in the price of standard equipment and in package 204A, it has been upgrade because option Q_ was selected.

The price on Q_ reflects only the net amount beyond the package price for the seats. You are not charged the full value of upgrade. Only the upgraded item will print.

Since other options may have been included with packages, you can review the total of the selected options at any time. Press **CTRL+F2** for a list of all selected options.

The Selected Options window will appear with a complete list of all options selected thus far.

Figure 9 shows a sample list of selected options.

You can move up or down this list to review current choices. Highlighting an option and pressing **ENTER** moves the pointer to the same option in Equipment window. Pressing **ESC** closes the list.

[illegible]

Figure 9. View Selected Options

Hot Tip!

The fastest way to find an option is to type the option code anywhere in the Optional Equipment window.

Typing one or two characters of the code is often enough to highlight the desired option. If you don't know the code, press **F3** to search.

Resolving Pricing Rules Compatibility

PC Carbook's compatibility resolution feature helps you handle complicated option-related pricing rules.

Each time you select or de-select an option, the program checks to see if there are pricing rules associated with that option.

When you select an item with rules that require additional selections or choices, a Compatibility Resolution window appears.

The window has two parts. The upper portion displays a list of options that can be selected, including a message telling you what to do next, and why you should do it.

In Figure 10, for example, the action message is, “21A expanded description.”

Possible options are listed within the Compatibility Resolution window in abbreviated form using the first line of their description.

The lower portion of the Compatibility Window displays the full description of the selection.

Standard Equipment

From the Optional Equipment window, press **F7** to view a list of standard equipment.

Depending on the make, model, and body style, there may be several screens of standard equipment listed.

Use the arrow keys on your keyboard to move through the list.

For directions on how to get a printout of the standard equipment refer to the chapter on Printing.

Standard equipment is listed by categories in the following order:

<<Mechanical>>

<<Exterior>>

<<Interior>>

<<EPA Fuel Economy Ratings>>

<<Safety Features>

This order is the same for all cars and trucks.

[illegible]

Figure 10. Compatibility Resolution Window

Compatibility Resolution windows will continue to open and close until all the rules relating to your original selection and subsequent secondary selections have been satisfied.

Aborting a Compatibility Resolution Process

You can abort the Compatibility Resolution routine by pressing **ESC**. PC Carbook will ask you to confirm your selection. Select **Y** to continue.

All selections and de-selections that you made throughout Compatibility Resolution routine will be returned to their original status, and PC Carbook returns you to the Optional Equipment window.

Adding Custom Options

You can create and add up to ten custom options on any single vehicle. Custom options look just like manufacturer options, but are different in several respects. For example, custom options:

- Have no logic associated with them
- Pertain only to the vehicle for which they are created
- Disappear when you load a new vehicle or exit PC Carbook

If you want to create options that will appear on all vehicles, or create options that will remain even after you have exited and restarted PC Carbook, refer to User-Defined Options in Advanced Features section.

Entering Custom Options

From the Optional Equipment window, press ALT+A for the Action pull down menu and select the Enter Custom Opts command.

A blank window similar to Figure 11 will appear. You can create up to ten custom options including codes, descriptions, invoice codes and retail prices.

Code	Description	Invoice Code	Retail Price
001	Standard 115" Chassis	001	2262.00
002	Standard 115" Chassis	002	2262.00
003	Standard 115" Chassis	003	2262.00
004	Standard 115" Chassis	004	2262.00
005	Standard 115" Chassis	005	2262.00
006	Standard 115" Chassis	006	2262.00
007	Standard 115" Chassis	007	2262.00
008	Standard 115" Chassis	008	2262.00
009	Standard 115" Chassis	009	2262.00
010	Standard 115" Chassis	010	2262.00

Base : 2262.00
Dest : 2262.00
Options : 3152.00
Total : 25964.00

Percentages: 12/17/99 25964.00

File Edit View Options Help

Figure 11. Custom Options Dialog Box

When finished entering options and prices, press F2.

The customized options you specify will appear on the last page of the Optional Equipment window.

To cancel this operation without creating any option information, press ESC.

Custom options can be deselected just as you would deselect any other option.

Marketing Adjustment

There are two regional advertising adjustments you can make with PC Carbook by vehicle, or by manufacturer.

- A calculated percentage
- A flat rate

The adjustment value is added to the invoice price of the vehicle at the bottom right of the Equipment window. The adjustment will appear on the printed equipment report.

To set a value press ALT+S and select Local Advertising.

If you have already selected a make, a window similar to Figure 12 will appear.

The type of adjustment is determined by each manufacturer division and can be either a percentage or a flat rate value.

The percentage is calculated based upon the total MSRP, plus factory options, minus the destination charge. The sum total is added to the invoice.

(This page left intentionally blank)

PL EXE	Order	Section	Info	Finance	Reports	Help
STATUS	Vehicle	1	1	1	1	1
Sub	44					1000
2023N						0.00
	NON-CALIFORNIA-NON-NORTHEAST STATES-NO CROSS BORDER STATES DEALER ORDER FOR CALIFORNIA OR NORTHEAST STATES REGISTRATION REQUIRED ON all in-state FORD, reclassifying					
	Division: FORD Percentage > 100% North local prime State State					
	IMPORTANT NOTE Ford has changed its financing charges are applied for 1976 models please press (H) for more detailed info.					
	> TYPE 4, 0, 1,					0.00
	8 of 43					

Figure 12. Marketing Adjustment (Ford)

If you select Local Advertising from the System menu, but have not selected a make, a list of manufacturer divisions will appear.

Highlight the appropriate division, and press **ENTER**.

Marketing adjustments can be saved as default settings. For more information see the Advanced Features section.

Ordering

PC Carbook has many features that help you complete a vehicle order. For example, after using the Complete Vehicle Checklist to ensure that you have configured an orderable vehicle, you can specify interior and exterior colors from color charts.

An order worksheet lets you create manufacturer-ready orders for all Ford, Chrysler and GM vehicles. The orders can be printed or saved to disk.

Figure 13. Order Menu

Special Ordering Options

PC Carbook allows you to order and price several types of special ordering options.

To view and pick these extended options, select the Use Special Equipment function from the Actions menu to switch between the RPO-only optional equipment screen and a split screen that displays both types.

Press TAB to switch between the RPO and Special Optional Equipment screens.

Press ESC to move back to the Model window.

Press F7 to switch between the Optional Equipment window and the Standard Equipment window.

Figure 14. Special Optional Equipment Window

If Compatibility Resolution is enabled, compatibility symbols are used in the RPO window. The symbols indicate:

Selected option "▲"

Included at no extra cost "☺"

Excluded by another option "☒"

Upgraded or replaced by another option "o"

Price varies based on options selected "◁"

Selecting a Special Ordering Option will disable Compatibility Resolution. Complete Vehicle Checklist and Pricing Logic will remain enabled.

Once Compatibility Resolution is disabled only the following symbols will be used in the Special Optional Equipment windows:

Selected option "▲"

Price varies based upon options selected. "◁"

Color Selection

Once all required optional equipment has been selected, you can specify the colors to add to the order.

Press **SHIFT+F2** for a color chart.

Only appropriate exterior and interior color combinations are listed, based upon equipment configuration.

Figure 15. Color Selection

Highlight the color combination and press **ENTER**.

A checkmark will appear next to each selected combination. You can select as many color combinations as you want.

To accept and return to the list of optional equipment, press **F2**. Press **ESC** to cancel.

Order Worksheet

You can access an Order Worksheet by pressing **SHIFT+F3**. These worksheets mirror the manufacturer-specific order forms of the current vehicle.

Through Order Worksheet you can create and print manufacturer-ready orders for all Ford, Chrysler, and GM vehicles.

Figure 16. Sample Order Transaction Box

Select an order transaction form type from the window. A second ordering window appears, allowing you to complete an order by specifying quantity and priority for each color combination selected.

The order worksheet can be printed from the Choose Reports list. Press **F10** for the list of report elements and select Order Worksheet.

Only the codes and information required for the order will print.

Figure 17. Sample Order Details Box (GM)

After completing the order details, a window similar to Figure 18 will appear. The window allows entry of additional transaction information required by the manufacturer, or information that you may want to save for future reference.

Figure 18. Transaction Information Box

Press **F2** to accept the information.

You must now choose to either print the order, save it to a disk, or preview the printer-ready order on the screen.

It's often a good idea to proofread the order on the screen before printing.

To preview the order, press **ALT+O** for the Order menu and select Order Worksheet Preview from the menu options.

Comparing and Saving

If you have configured an orderable vehicle, you can compare the vehicle to others, or you can save the vehicle for future reference.

Comparing Vehicles

You can simultaneously compare three vehicles. This has the same effect as running three copies of PC Carbook at the same time.

It's important to note that the amount of random access memory (RAM) in your computer may prevent you from comparing three vehicles at once. If you encounter problems using this feature, call Client Support for more information.

Press **ALT+V** for the Vehicle menu.

Toward the bottom of the menu is a list of alternate vehicles. The program always starts on Veh #1 and will list whatever vehicle you started with.

To begin working on other alternative vehicles use the menu to select or press **ALT+2** or **ALT+3**.

To go back to the original vehicle, press **ALT+1**.

When you switch between alternative vehicles, PC Carbook returns you to where you left off with the alternate vehicle. The program displays the current vehicle number in the top border of the current window.

To replace the year, model, and style with your own description, move the pointer into the description field and begin typing. Your first key stroke will clear the entire field.

To accept the file name and description, press **F2**.

Retrieving A Vehicle

Retrieving automatically loads the make, model, body style, optional equipment, and financing information for a previously saved vehicle.

The retrieved information is placed in the alternative vehicle (**ALT+1**, **ALT+2**, or **ALT+3**) in which you are currently working.

Press **ALT+F4** for an alphabetical list of saved vehicles. If there are vehicles saved, a box similar to Figure 21 will appear.

Type the letters of a file name and the pointer will move to the first file with the same letter.

Type additional characters to locate a file or use the **UP** and **DOWN ARROW** keys to move throughout the list.

Highlight the CarSave file you wish to retrieve and press **ENTER**.

PC Carbook interface showing a list of saved vehicles. The 'Chevy Tracker' is highlighted. The interface includes fields for vehicle details, a list of options, and a summary of costs.

Vehicle	Make	Model	Year	Body Style	Options	Price	Options Price	Total Price
100 Chevy Tracker	Chevy	Tracker	1992	4dr	13117.35	13925.00	400.00	14325.00
101 Explorer	Ford	Explorer	1991	4dr	10000.00	10000.00	0.00	20000.00
102 Camaro	Camaro	Camaro	1990	2dr	10000.00	10000.00	0.00	20000.00
103 Mustang	Mustang	Mustang	1990	2dr	10000.00	10000.00	0.00	20000.00
104 Taurus	Taurus	Taurus	1990	4dr	10000.00	10000.00	0.00	20000.00
105 Oldsmobile	Oldsmobile	Oldsmobile	1990	4dr	10000.00	10000.00	0.00	20000.00
106 Pontiac	Pontiac	Pontiac	1990	4dr	10000.00	10000.00	0.00	20000.00
107 Volvo	Volvo	Volvo	1990	4dr	10000.00	10000.00	0.00	20000.00
108 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
109 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
110 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
111 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
112 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
113 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
114 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
115 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
116 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
117 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
118 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
119 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
120 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
121 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
122 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
123 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
124 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
125 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
126 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
127 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
128 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
129 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
130 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
131 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
132 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
133 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
134 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
135 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
136 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
137 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
138 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
139 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
140 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
141 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
142 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
143 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
144 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
145 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
146 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
147 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
148 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
149 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
150 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
151 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
152 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
153 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
154 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
155 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
156 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
157 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
158 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
159 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
160 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
161 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
162 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
163 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
164 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
165 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
166 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
167 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
168 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
169 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
170 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
171 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
172 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
173 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
174 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
175 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
176 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
177 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
178 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
179 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
180 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
181 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
182 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
183 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
184 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
185 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
186 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
187 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
188 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
189 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
190 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
191 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
192 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
193 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
194 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00
195 Honda	Honda	Honda	1990	4dr	10000.00	10000.00	0.00	20000.00
196 Nissan	Nissan	Nissan	1990	4dr	10000.00	10000.00	0.00	20000.00
197 Subaru	Subaru	Subaru	1990	4dr	10000.00	10000.00	0.00	20000.00
198 Acura	Acura	Acura	1990	4dr	10000.00	10000.00	0.00	20000.00
199 Lexus	Lexus	Lexus	1990	4dr	10000.00	10000.00	0.00	20000.00
200 Toyota	Toyota	Toyota	1990	4dr	10000.00	10000.00	0.00	20000.00

Figure 21. Sample Retrieve Window

Consumer Information

Consumer-related information appears under a menu item marked Info. Press ALT+I to use any of the topics under the Info menu. See Figure 22.

Move the pointer up and down to highlight a selection and press ENTER to select. The information for each selection appears in a separate screen box.

Figure 22. Consumer Info Menu

If a topic does not show in bright text, or the pointer will not highlight a topic, then no information is available.

Any or all Consumer Info can be selected to print.

Vehicle Specifications

Vehicle Specs show:

- Payload, towing and trailer capacities
- Powertrain specifications
- Interior, exterior and cargo dimensions
- Other technical and performance details

Vehicle Specs give details on the above information, all calculated based upon the equipment selected. This information will update as optional equipment is added and will always show the current dimensions, capacities, and specifications.

Use either the Info menu or press SHIFT+F5 while in the Optional Equipment window to view current vehicle specifications.

Rebates/Incentives

This box shows all known national and regional consumer rebates or special manufacturer financing programs available on a vehicle.

Rebate information is specific to the vehicle style and matches the manufacturer-to-consumer rebate information as distributed by the manufacturer.

Figure 23. Rebates box

PC Carbook displays the expiration dates of the rebates. All rebates are national except those marked with the (R) symbol. This symbol signifies that a rebate, up to the amount shown, is available but can vary by region.

Warranty Information

PC Carbook takes the standard warranty information for each vehicle and adds information on type, duration, and mileage restrictions.

In addition to the basic warranty information, this box will show:

- Deductibles that apply to warranty service
- Whether the warranty is transferable
- Warranty transfer fees
- Warranties that can be substituted

Refer to “terms Used in PC Carbook,” located in the Appendix, for a list of the market classes by vehicle type and price breakdowns.

You can use the Choose From Market Class function to quickly locate and build a vehicle for comparison.

Press **ALT+V** for the Vehicle menu and select Choose From Market Class.
Highlight a vehicle to compare and press **ENTER**.

Editorials

The Editorials section shows any awards or ratings that a vehicle has earned in the marketplace.

Sources for vehicle editorials can include manufacturer data, press releases, PR NewsWire, Consumer Reports, and other popular motor vehicle magazines.

System	Vehicle	Order	Options	Unit#	Finance	Repurchase	Lease
Unit #1:	Optional Equipment						
069	CCE EMISSIONS >>>						
785	SERIAL PARTS >>>						
MCI							
HUB							
MC7							

* WHITE CROWN TEST RESULTS: Estimate# 0.00

Frontal crash ratings: Driver's seat Passenger's seat 0.00

Side crash test load: Near Passenger: Mar 00

Driver: Mar 00

Results based on a 35 MPH frontal crash and 38.5 MPH side
crash. Hazards are reported in a separate section.
alarm, which five stars indicating the best crash protection
for vehicles within the same weight class. This test used

NO	Rate	Cost	Options	Adm/Rdg	Total
00	\$6.00	9.00			15.00
22859	\$6.00	4.00			10.00
		4.00	16.00		24.00
			0.00		0.00
					0.00
					10182.50

Mar/Up : JR.12x Effective: 02-01-99

Figure 26. Editorials box

System	Vehicle	Order	Options	Finance	Repairs	Help
Sub M:	Optional	Equipment	(Retail)	Invoice		MSRP
1	FF9	FEDERAL MISSOURI			0.00	0.00
2	NG1	MEMO	Warranty:		0.00	0.00
3	DC		* Dealer: 3 Years/36,000 Miles			
4	YF5	CRM	Distributor: 3 Years/36,000 Miles		0.00	0.00
5	W08	CRM	Distributor: 6 Years/100,000 Miles		0.00	0.00
6	W08	CRM	Manufacturer: 3 Years/36,000 Miles		0.00	0.00
7	W08	CRM	Manufacturer: 3 Years/36,000 Miles			
8	MC7	Warranty: 3 Years/36,000 Miles			0.00	0.00
9	MC7	FEDERAL EMISSIONS OVERLIEP MUST BE ORDERED				
10	MC7	Units shipped to dealer in Federal area				
11	MC7	Units shipped to dealer in Federal area				
12	MC7	Units shipped to dealer in Federal area				
13	MC7	Units shipped to dealer in Federal area				
14	MC7	Units shipped to dealer in Federal area				
15	MC7	Units shipped to dealer in Federal area				
16	MC7	Units shipped to dealer in Federal area				
17	MC7	Units shipped to dealer in Federal area				
18	MC7	Units shipped to dealer in Federal area				
19	MC7	Units shipped to dealer in Federal area				
20	MC7	Units shipped to dealer in Federal area				
21	MC7	Units shipped to dealer in Federal area				
22	MC7	Units shipped to dealer in Federal area				
23	MC7	Units shipped to dealer in Federal area				
24	MC7	Units shipped to dealer in Federal area				
25	MC7	Units shipped to dealer in Federal area				
26	MC7	Units shipped to dealer in Federal area				
27	MC7	Units shipped to dealer in Federal area				
28	MC7	Units shipped to dealer in Federal area				
29	MC7	Units shipped to dealer in Federal area				
30	MC7	Units shipped to dealer in Federal area				
31	MC7	Units shipped to dealer in Federal area				
32	MC7	Units shipped to dealer in Federal area				
33	MC7	Units shipped to dealer in Federal area				
34	MC7	Units shipped to dealer in Federal area				
35	MC7	Units shipped to dealer in Federal area				
36	MC7	Units shipped to dealer in Federal area				
37	MC7	Units shipped to dealer in Federal area				
38	MC7	Units shipped to dealer in Federal area				
39	MC7	Units shipped to dealer in Federal area				
40	MC7	Units shipped to dealer in Federal area				
41	MC7	Units shipped to dealer in Federal area				
42	MC7	Units shipped to dealer in Federal area				
43	MC7	Units shipped to dealer in Federal area				
44	MC7	Units shipped to dealer in Federal area				
45	MC7	Units shipped to dealer in Federal area				
46	MC7	Units shipped to dealer in Federal area				
47	MC7	Units shipped to dealer in Federal area				
48	MC7	Units shipped to dealer in Federal area				
49	MC7	Units shipped to dealer in Federal area				
50	MC7	Units shipped to dealer in Federal area				
51	MC7	Units shipped to dealer in Federal area				
52	MC7	Units shipped to dealer in Federal area				
53	MC7	Units shipped to dealer in Federal area				
54	MC7	Units shipped to dealer in Federal area				
55	MC7	Units shipped to dealer in Federal area				
56	MC7	Units shipped to dealer in Federal area				
57	MC7	Units shipped to dealer in Federal area				
58	MC7	Units shipped to dealer in Federal area				
59	MC7	Units shipped to dealer in Federal area				
60	MC7	Units shipped to dealer in Federal area				
61	MC7	Units shipped to dealer in Federal area				
62	MC7	Units shipped to dealer in Federal area				
63	MC7	Units shipped to dealer in Federal area				
64	MC7	Units shipped to dealer in Federal area				
65	MC7	Units shipped to dealer in Federal area				
66	MC7	Units shipped to dealer in Federal area				
67	MC7	Units shipped to dealer in Federal area				
68	MC7	Units shipped to dealer in Federal area				
69	MC7	Units shipped to dealer in Federal area				

Figure 24. Warranty Information

Recalls

This box provides manufacturer recall information for the current model year. Only safety recall directives made by the National Highway Traffic Safety Administration (NHTSA) are shown.

System	Vehicle Order Number	Action	(Retail)	Finance Reports Help
Open All:	Options	Equipment		Invoice
PEN	1975	PENDING DEPOSITIONS	\$ 80	\$.00
NCL		* Number Involved: 2.489	Recalls	\$.00
WHH		Dates of Manufacture: June - August 1999		\$.00
MCT		INITIAL Recall No. 990230/GN Recall No. 99US1-08-G-041		\$.00
Noncompliance: These vehicles do not comply with requirements of FMVSS No. 208, "Occupant Crash Protection". The front seat belt assembly does not attach to the instrument panel carrier assembly that was not strong enough to allow the vehicle to meet the sled test performance requirements. A front seat occupant,				
DR B&B	GL Car Sales	Date	\$ 140.00	\$ 140.00
ZF69	GL Manual	Options	\$ 16.00	\$ 16.00
harshUp		Rdv/RdL	\$ 0.00	\$ 0.00
Total :	Effective: 07/01/99		\$ 160.00	\$ 160.00

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Figure 25. Recalls

Market Class

This topic provides a list of competitive makes of vehicles in the same class as the current vehicle. This information considers the size of the vehicle, as well as its price range.

The categories for vehicle class are taken from the Environmental Protection Agency's publications with the addition of a mini-vans classification.

Printing

PC Carbook can create custom reports and adjust them to a client's needs. This also includes printing a report or saving reports as a text file.

Pressing ALT+R pulls down the reports menu. The Print command can also be initiated by pressing F10 without using the menu.

Figure 27. Report Menu

Company Info

Use the Company Info command to place your company's name and address information in the heading on the first page of equipment, loan, or lease reports.

The Company Info command displays a dialog box similar to Figure 28. Here you enter the desired information. Press F2 to use the new information.

Figure 28. Company Information Dialog Box

The company information only needs to be entered once if you save the report settings. See Saving Defaults in the Advanced Features section.

Print Reports

To select the Print command, use either the menu or press F10. The Print command brings up a list of report elements similar to Figure 29. All possible elements for a report are displayed on one screen.

To exit the Report Setup dialog box without changing selections, press ESC.

Use the arrow keys to highlight information to be included in the report you want to print and press ENTER.

An X will appear next to this selection, indicating that it can be printed. When finished, press F10 to print.

Figure 29. Report Setup Screen

Report elements marked with an asterisk allow additional information to be placed in the reports. To open dialog boxes to add this information, highlight the element and press TAB.

All print settings can be accepted and saved as program defaults to further simplify printing.

After configuring the printout, press F10 to send the selected report to the printer.

Printer Setup

The Printer Setup command prepares your printer by specifying the printer port and type of paper feed. Space is also provided to add printer control codes.

Normally no changes are needed.

However, if you have a special printer or use a different printer port, you can change the default settings. Refer to your printer manual for control codes and settings. Call Client Support for help if you encounter problems. Also note that PC Carbook DOS may have problems when printing to newer printers. Please check your printer software for incompatibilities.

Instructions on how to use the Print to File command can be found in the Advanced Features sections.

It's important to remember that an X must appear next to any item that you want to print.

Financing

With PC Carbook's Loan and Lease Comparison feature you can perform side-by-side comparisons on four different financing plans for any single vehicle.

Alternatively, you can perform a side-by-side comparison of a single financing plan on four different vehicles.

In addition, you can both print the comparison data, as well as save it to a file for future reference.

The Finance windows allow you to:

- ➔ Adjust almost all the figures for easy comparison
- ➔ Rollback either purchase price, trade-in, down payment or interest rate to achieve a desired monthly payment
- ➔ View or print an amortization schedule for most financing plans that you design

The Finance menu item is active from the opening Make screen. You can perform loan and lease functions through the Finance menu or through hot keys.

If you select a specific style of vehicle, the MSRP or invoice price will automatically be carried into the loan or lease screens.

The Loan Window

You can enter the Loan Comparison by pressing F9. A sample Loan Comparison window appears similar to Figure 30.

To return to Equipment window, press F8.

To return to the Loan Comparison window without changing any information, press ESC.

Use the Loan Settings command to:

- ➡ Select the number of columns (plans) to display
- ➡ Choose Invoice or MSRP as the capitalized cost base
- ➡ Enter the sales tax percentage (if any) and designate whether to calculate the tax on the sales cost or trade difference
- ➡ Label columns for better identification
- ➡ Set an item to rollback for a given monthly payment

Hot Tip!

Many settings are marked with (+/-). You can switch to other choices by pressing the Space Bar.

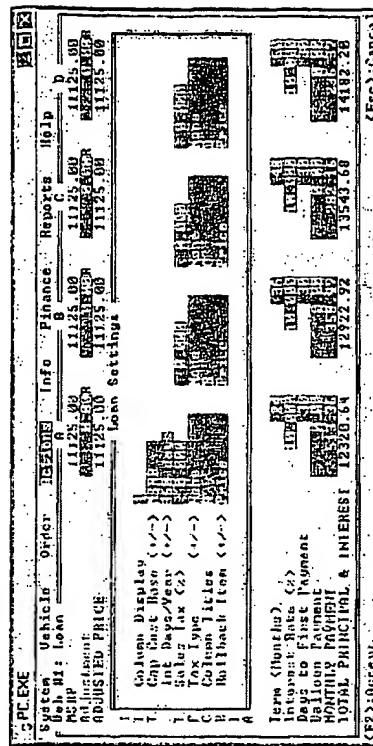


Figure 31. Loan Settings Dialog Box

Use the Loan Comparison window as an electronic worksheet. Each column forms a complete and adjustable loan.

Enter your own figures for each field as you start to build a loan. To move between columns of the Loan Comparison window use **TAB** and **SHIFT+TAB**.

It's not necessary to enter decimal points. Type the number and press ENTER.

For descriptions of loan terms, press **ALT+H** to view the Help menu and select Help Topics. The Loans topic has a list and definition of all loan window fields.

Commands listed under the Action menu allow quick editing by copying individual items to other columns, as well as copying whole columns and deleting whole columns.

Notice that some of the items in each column cannot allow direct editing on the loan comparison window. Most of these items are values fixed as Loan Settings.

Loan Settings

To change loan settings press **ALT+A**. Press **ENTER** to select Loan Settings.

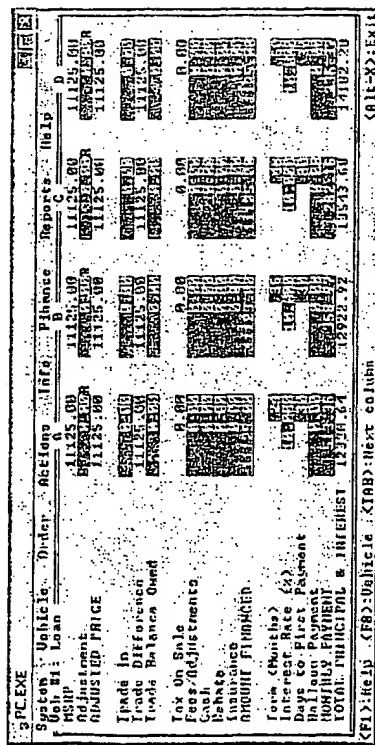


Figure 30. Loan Comparison Window

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Saving Loan Items As Defaults

Several fields hold values that can be saved from one loan comparison to another. This information can affect the whole worksheet or an individual column.

As you develop different loans, it's possible to save time by storing frequently used values as defaults. The following items can be stored as defaults:

- MSRP or invoice price
- Sales tax rate, if any
- Sales tax base
- Custom column titles
- Rollback item
- Interest rate
- All values in non-calculated fields

Values that will vary from customer to customer should probably not be saved as a default.

To save settings and values, press **F6** and pick Loan Settings.

The Lease Window

The lease window has two views:

1. **Lease Comparison View.** This view appears when you first enter the Lease window. Use this when you want to do side-by-side comparisons.
2. **Single Lease View.** Use this view to review a leasing plan in detail, or to change fields.

Like the Loan window, the Lease window acts as an electronic worksheet and allows you to see the effect of various changes to lease terms.

If you select Lease from the Body Style window, the Optional Equipment window, or the Loan window, a value will be brought forward for the current vehicle.

The program will calculate the currently configured vehicle's Residual Value based on whichever Residual Source is selected. Press **CTRL+F9** to enter the Lease window.

If you select Lease from the Make or Model window, the capitalized cost will default to \$10,000, but can be modified.

To return to the Equipment window, press **F8**.

Lease Comparison View

Figure 32 shows a sample Lease Comparison with all four columns displayed. Use the following keys to navigate within the Lease Comparison Window:

- Use **TAB** and **SHIFT+TAB** to move the pointer between columns. **TAB** moves one column to the right and the **SHIFT+TAB** moves one column to the left.
- Press **ENTER** to complete the current entry and/or move to the next field.
- Use the **UP** and **DOWN ARROW** keys to move the pointer up or down within a column.
- Use the **LEFT** and **RIGHT ARROW** keys to move the pointer within a field.
- Use **BACKSPACE** to correct typing errors and to move the pointer left within a field.
- Use **HOME** and **END** to move the pointer to the first or last position within a field.

Vehicle	Order	Options	Info	Finance	Reports	Help
1992 Ford Taurus	11125.00	11125.00	11125.00	11125.00	11125.00	11125.00
Adjusted Residual	11125.00	11125.00	11125.00	11125.00	11125.00	11125.00
Adjusted Residual Cost	11125.00	11125.00	11125.00	11125.00	11125.00	11125.00
Cap'd Fees & Taxes	0.00	0.00	0.00	0.00	0.00	0.00
Trade In	0.00	0.00	0.00	0.00	0.00	0.00
Cash	0.00	0.00	0.00	0.00	0.00	0.00
Amount Financed	11125.00	11125.00	11125.00	11125.00	11125.00	11125.00
Adjusted Residual MSRP	11125.00	11125.00	11125.00	11125.00	11125.00	11125.00
Monthly Payment	36.000	36.000	36.000	36.000	36.000	36.000
Adjusted Residual	6087.50	6087.50	6087.50	6087.50	6087.50	6087.50
Adjusted Residual Cost	0.00	0.00	0.00	0.00	0.00	0.00
Total Amount Financed	6087.50	6087.50	6087.50	6087.50	6087.50	6087.50
Term (Months)	36	36	36	36	36	36
Money Factor	0.000	0.000	0.000	0.000	0.000	0.000
Interest Rate (%)	12.000	12.000	12.000	12.000	12.000	12.000
Monthly Payment	36.000	36.000	36.000	36.000	36.000	36.000
Adjusted Residual	6087.50	6087.50	6087.50	6087.50	6087.50	6087.50
Total Amount Financed	6087.50	6087.50	6087.50	6087.50	6087.50	6087.50
CF1: Help	CF2: Switch Lease View	CF3: Vehicle	CF4: Next column	CF5: Exit		

Figure 32. Lease Comparison Window

Single Lease View

To work on an individual leasing plan, move the pointer anywhere into that column and press F7, or choose the Switch Lease View option from the Actions menu.

The Single Lease view contains the same information as the Lease Comparison view plus a greater level of detail and the ability to adjust additional fields. Refer to Figure 33 for an example.

Figure 33. Single Lease Window

- Use the **PAGE UP** and **DOWN** keys while you are in the Single Lease view to move between the four Single Lease windows.
- In Single Lease view, **TAB** works like the **ENTER** key. To move to the right column from the left column, the pointer must be in the bottom portion of the left column.
- Pressing **TAB** or **ENTER** will move the pointer to the right column.

Adjustments to Lease Settings

To select the Lease Settings command, press **ALT+A**. The Lease Settings command will be highlighted.

Press **ENTER** to select. To return to the Lease Comparison window without changing settings, press **ESC**.

The Lease Settings command displays a dialog box similar to Figure 34 from which you make selections or enter information.

Figure 34. Lease Settings Dialog Box

There are five settings that affect all worksheet columns.

1. **Column Display.** Use this option to display from one to four columns in the Lease Comparison window.
2. **Capitalized Cost Base.** Start your lease calculations using either the discounted MSRP or the Invoice price. Known as the capitalized (cap) cost base, the number appears at the top of each column position. The cap cost base is the starting point for determining vehicle capitalized cost and ultimately the amount financed.
3. **Sales Tax Settings.** Use the Tax on Cap (%) or Tax on Pmt (%) setting only if you want PC Carbook to calculate a sales tax against Capitalized Cost or Monthly Payment.
4. **Column Titles.** Use this option to create your own titles for each column. These titles can be saved as defaults and will be printed above the selected columns in any printout, as well as displayed in the window.
5. **Rollback Items.** Use this option to construct a lease based upon a desired monthly payment amount. The item selected for rollback will automatically adjust to deliver the desired monthly payment amount. The highlighted letter R will appear on screen next to the item you specify.

Calc Method

You can use the Calc Method option to select one of five methods for calculating a lease payment. These methods are:

1. APR (simple interest calculation-first payment applied directly to principal)
2. APR-2 (interest in advance calculation-first payment applied to both principal and interest)
3. Chrysler Credit Gold Key
4. Ford Motor Credit Company Red Carpet
5. General Motors Acceptance Corporation SmartLease

The Gold Key, Red Carpet, and SmartLease leasing programs are commonly referred to as captive leases.

Calculation Method

The choice of Calculation Method can affect how PC Carbook handles some lease entries, specifically Residual MSRP, Term, Cost Per Excess Mile, and Excess Mile Charge.

(Residual MSRP can differ from Discounted MSRP due to dealer-installed options or retail/fleet discounts.)

To construct a typical non-captive lease, set Residual Source to ALG and Calculation Method to APR.

If you wish to construct a Ford Red Carpet lease instead, set Residual Source to Ford and Calculation Method to Red Carpet.

Residual Source

Residual values are estimates of predicted future value expressed as percentages and published for use in preparing leases.

Residual Sources included in PC Carbook are:

- Automotive Lease Guide (ALG)
- Chrysler Credit
- Ford Motors Credit Company
- General Motors Acceptance Corporation
- GECAL National and CA/NV/AZ areas

When the Residual Source is set to None, you can enter Residual Pctg (%) or Residual Value information from any Residual Source you desire.

Each Residual Source has its own policy for residualizing Dealer-Installed Options (DIO's). (See Residualization of Dealer-Installed Options for more information.)

When Residual Source is set to Chrysler, the Residual MSRP is the same as Discounted MSRP. All other Residual Sources use Residual MSRP (the retail/fleet discounts are added back in).

Residual Sources provide Residual Pctg (%) figures only for 12-, 24-, 36-, 48- and 60-month terms. Note that 12-month and 60-month residual data is not available on some vehicles or sources.

When Residual Source is set to None in a column, the Residual Pctg (%), Residual Value, and Term fields are open. This means you can enter values as you wish.

Each Residual Source determines an excess mile charge based upon the total miles allowed over a given term, as well as the class of vehicle (based on MSRP), and the cost per excess mile.

When the PC Carbook calculates the excess mile charge, it factors in the cost per excess mile, the term, the miles, the year expected, and the miles/term allowed according to the vehicle and Residual Source you've selected.

Interest Base

The interest base (Int/MF Base) settings determine if Money Factor or the Interest Rate (%) will be used as the base for the calculation of the Monthly Payment. For each column, you can specify which of the two entries you wish to use as the interest base.

PC Carbook calculates the interest base as a fixed number, while other values, such as Money Factor and Interest Rate, will be recalculated.

Whenever the Money Factor is changed, PC Carbook automatically calculates the equivalent Interest Rate (%). Conversely, whenever Interest Rate is changed, PC Carbook recalculates Money Factor.

Create a Blank Lease

You use the Toggle Blank Lease command to change the pricing information in the Discounted MSRP/Invoice field of one or more columns. (The same action in the Loan window will switch to a blank loan.)

In the Lease window, press **ALT+A** for the Actions menu and press **T** for the Toggle Blank Lease command.

Each column will allow you to edit the base price field. Residual Source will be set to None, making it an editable field.

Saving Lease Items as Defaults

Most values entered in the lease window can be saved as defaults. These defaults can be saved for the current session or saved to disk, which makes them available for use in future work sessions.

Since PC Carbook supports building a maximum of four separate leasing plans, you can create four default leases.

Calculated values that vary from vehicle-to-vehicle or from lease-to-lease cannot be saved as defaults. Examples of these values include:

- ➡ Resid MSRP
- ➡ Invoice
- ➡ Capitalized cost
- ➡ Sales tax on payment
- ➡ Amount financed

When ready to save new settings as defaults, press **F6** and highlight Lease Settings. Press **ENTER** to save.

To Display Amortization Schedule

PC Carbook builds an amortization schedule for most leasing plans that you develop. These schedules show:

- ➡ Payment number (APR leases show term +1 payments, APR-2 leases show term + 0 payments. For example, for term=48, APR shows 49 payments and APR-2 shows 48.)
- ➡ Beginning balance (balance before each payment is received)
- ➡ Payment amount
- ➡ Interest (the portion of each payment that is applied to the interest owed)
- ➡ Principal (the portion of each payment that is applied to reducing the principal owed)
- ➡ Ending balance (balance after each payment)

To display the amortization schedule associated with a particular leasing plan, move the pointer into that column and press **ALT+A**, and then **A**.

Amortization schedules are not available for leases using the GMAC calculation method.

Residualization of Dealer-installed Options

Some dealer-installed options (DIOs) increase a vehicle's Residual Value while others do not. For calculation purposes the program uses the ALG (Automotive Lease Guide) definition for DIOs.

The ALG recognizes 14 qualified DIOs. These appear in the front pages of ALG's *Residual Percentage Guide*.

You can select qualified DIOs by placing the pointer in the Type field of the Dealer-installed Options window.

Each Residual Source states a maximum retail amount for every DIO that can count toward the Resid MSRP. Below is a list of rules each lease source imposes on DIOs.

ALG. For each qualified DIO selected, the program adds to Resid MSRP the *smaller* of DIO's retail and maximum retail as specified by ALG. See your *ALG Residual Percentage Guide* for the current maximum retail values.

Chrysler Credit. For each qualified DIO selected, the program adds DIO's invoice to Resid MSRP, regardless of DIO's retail.

Ford Motors Credit Company. For each qualified DIO selected, the program adds the *smaller* of DIO's retail and DIO's invoice plus 15 percent to Resid MSRP.

General Motors Acceptance Corporation. For each qualified DIO selected, the program adds to Resid MSRP the *smaller* of DIO's retail and DIO's invoice plus 20 percent.

None. Resid MSRP is *not* affected by any DIO's

For more information on DIOs, refer to Entering User-Defined Options in the Advanced Features Section.

Loan / Lease Comparison

To view the comparison screen use the Finance menu or press **ALT+F9**. Two lists of simplified loan and lease information show a side-by-side comparison of basic lease and loan elements similar to Figure 35.

Values are not entered directly into this screen. The values shown are brought forward from the main finance screens.

PC EXE
System: Vehicle Order Actions Info Finance Reports Help
User ID: Lease/Loan Comparison

Column Title	Lease	Loan
Residual Value	0.00	0.00
Taxes (Monthly)	0.00	0.00
Tax Con Cap Cost	0.00	0.00
Monthly Pmt w/ Tax	283.04	513.36

<F1>:Help <F2>:Vehicle <F3>:Next Lo/Loan <TAB>:Next Column <Alt-R>:Exit

Figure 35. Loan/Lease Comparison

You can move through the four columns of either lease or loan. To move between Lease to Loan, press **TAB** or **ENTER**. While in either column you can advance to the next finance screen by pressing **PAGE DOWN**. To go back to a previous screen press **PAGE UP**.

In addition to the Loan/Lease comparison feature, this screen can serve as a customer lease presentation tool. Pressing **F7** will make the Loan information disappear, and pressing **F7** again will restore the loan information.

You can print the Lease/Loan comparison, however, remember that it will print exactly as it appears on the screen. If you have masked the loan information on the screen, the loan information will appear on the print out.

Advanced Features

Saving Defaults

After customizing settings or fields, press **F2** to save changes. The function allows you to save your changes for this session only and will restore the previous settings when you exit the program.

You can keep these customized settings, as well as many of the values entered in fields of the Loan and Lease windows as new defaults to use the next time you start PC Carbook.

If you wish to save new settings use the Save Settings command under the System menu. To begin, press **ALT+S** for the System menu and **S** to Save Settings.

PC EXE
System: Vehicle Order Actions Info Finance Reports Help
User ID: Optional Equipment

Vehicle	Options	MSRP
1997	OPTIONAL EQUIPMENT	0.00
VFS	REDUCED EMISSIONS	0.00
NH1	REDUCED EMISSIONS	0.00
NH8	REDUCED EMISSIONS	0.00
NC7	REDUCED EMISSIONS	0.00

Base : 9616.58
Dest : 440.00
Options : 0.00
Adv/Adj : 0.00
Total : 10102.58

MarkUp : 10.12% Effective: 07-Jul-99

<F1>:Help <Enter>:Select <Esc>:Cancel

Figure 36. Save To Disk Dialog Box

The Save To Disk dialog box similar to Figure 36 appears. Highlight the type of settings you want to save and press **ENTER**. To exit without saving any defaults, press **ESC**.

PC Carbook will use the new defaults each time you start the program. You can alter defaults and save them at any time.

If you quit this command without saving, the new settings will be used only for the current session.

You may occasionally need to quickly check all aspects of pricing to determine margin or cash flow.

The Price Breakdown option in the Action menu summarizes the manufacturer price addition and discounts. Like price levels, the price breakdown reflects each manufacturer's pricing elements.

[illegible]

Figure 37. Sample Price Breakdown (Saturn)

To view the price breakdown, press **ALT+A** for the Actions menu and press **B** for Price Breakdown. This feature is available on GM, Ford, and Chrysler vehicles only.

You can customize a brief message to appear at the bottom of the options list using the Memo Field feature. The message can be up to 10 lines of 60 characters each.

Press **F10** to display the Choose Report box. Move the pointer to the Custom Message line and press **ENTER**.

An X will appear indicating that a message would be ready to print. Press TAB to open a text entry box and type your message.

To print a report with the new message, press **F10**. Alternatively, you can accept the new text and return to the Choose Report box by pressing **F2**.

Any message can be saved as one of the report setting defaults. See Saving Defaults for more information.

You may occasionally want to open and print a report without opening PC Carbook.

Use the Print to File command to save a report as a text file that you can edit and print using most word processors.

To select the Print to File command, press **ALT+F**, and then press **F**.

To exit the Print to File dialog box without changing its information, press **ESC**.

A Report Setup window will appear similar to the Print command window. Use the arrow keys to move to the items you want added to the report and press **ENTER**.

To make additional changes in the Report Setup box, press **F2** to temporarily save the changes. The program accepts these settings and returns you to the Choose Report dialog box.

Press **F10** to print. PC Carbook will open the Print to File window. See Figure 38.

Step-By-Step Logic

The program automatically works with step-by-step logic **OFF**. Obvious logical choices are made for you so you can quickly build a vehicle spec.

With step-by-step logic **ON**, PC Carbook leads through every step of the decision-making process and, consequently, building a vehicle spec takes more time.

If you want to see the steps PC Carbook takes to choose equipment options, you can switch on the step-by-step logic by pressing **ALT+A** and **L**.

The step-by-step logic is switched off the same way.

View Whodunnit?

You can use this command to discover which option is responsible for the logic symbol on the current option.

Where the Included, Required, or Excluded symbol appears to the left of an item, highlight the item and press **CTRL+F7**.

A small window displays the logic rule.

Expert Logic On/Off

Each time you select an equipment option, PC Carbook's Expert Logic works through the manufacturer's ordering and pricing rules.

If the desired option has an ordering or pricing rule associated with it, PC Carbook either automatically carries out the appropriate action, or it tells you what must be done before you can select that option.

When the Expert Logic is off, you are able to choose any combination of options regardless of the pricing rules. The Price Variations command can also be used to select the price that you feel is appropriate.

Use this feature with caution. Care needs to be taken to choose only the option that are compatible as the program no longer includes, excludes or requires options based on ordering rules.

To turn off the Expert Logic, press **ALT+A** and **X**. A reminder message appears at the bottom of the screen.

When you disable PC Carbook's Expert Logic, it remains disabled for the remainder of the current vehicle session. You can reactivate Expert Logic by selecting another body style or by clearing all selections for the current vehicle.

You cannot switch Expert Logic back on by using the Action menu.

Cash Quote

When you want to give a cash quote to a customer instead of a lease or loan printout, move to column **A** in the Loan window.

Set the value for Interest Rate to zero (0). Set the length of Term to the number one (1). Fill in any additional values for dealer mark up, tax rate or adjustments.

When ready to print, press **F10**. Place an **X** by Loan, column **A** in the Choose Report box. Make additional selections to print for this report and press **F10** to print.

2000 Acura Integra 3dr Sport Cpe Is Manual

A	
MSRP	19755.00
+ Adjustment	500.00
= Subtotal	20255.00
- Trade In	0.00
= Trade in Difference	20255.00
Sales Tax Rate	5.000%
+ Sales Tax	1012.75
+ Trade Balance Owed	0.00
+ Fees/Adjustments	0.00
- Rebate	0.00
+ Insurance	0.00
= Total to Pay	21267.75

Figure 40. A representation of what a Cash Quote, MSRP as cap cost base screenshot looks like.

Notice that the cash quote will differ slightly depending on whether Invoice or MSRP was used as the Cap Cost Base.

The first line will be labeled with the selected cap cost base. When Invoice is used for cap cost base, the second line item will state Dealer Markup instead of Adjustment.

Adding a Marketing Message to a Report

It is possible to append an additional marketing message to the end of any PC Carbook report.

This feature gives you the ability to create advertising copy of unlimited length on any topic. You can use this feature to promote other services, print disclaimers, contracts, and simple forms.

To use PC Carbook's advertising print feature:

1. Compose your message using an ASCII word processor or a DOS text editor
2. Name your message PC.PRT
3. Save PC.PRT to the PC Carbook subdirectory

PC.PRT appears in the Choose Reports window under the Miscellaneous heading and can be switched on by typing an X next it.

Whenever PC Carbook generates a report, it looks for a PC.PRT file in the PC Carbook subdirectory. When the program finds the PC.PRT file, it adds the advertising copy to the end of the report.

Selecting Used Vehicles

Selecting used vehicles is similar to selecting new vehicles with minor variations in the appearance of certain screens and their functionality.

To select a vehicle:

1. Move through the lists
2. Highlight the desired selection
3. Press **ENTER** to select it

Use arrow keys or the mouse to move through the lists.

A list of all Makes sold in America appears on the screen when you first switch into the Used Vehicle module. After Make is selected, a Year window appears. Notice that the current model year is sold as a used car.

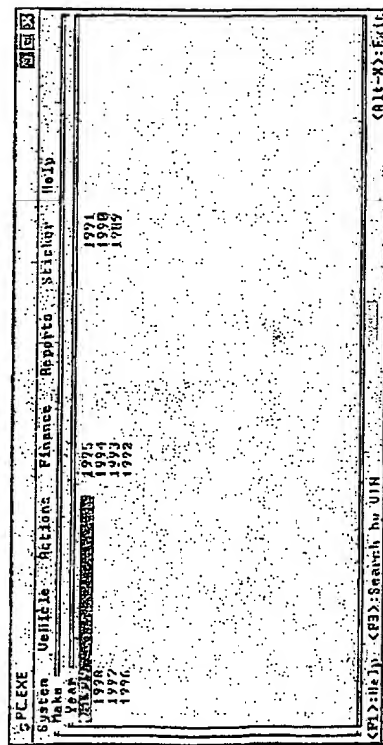


Figure 41. Year Screen

You can quickly pick a year from the Year screen by typing the last two digits of the year

Vehicle Identification Number (VIN)

Entering a vehicle identification number or VIN is an alternative to selecting a car through Make, Year, Model and Style.

To locate a vehicle by VIN, use the Vehicle menu or press **F3** at any time. Type the VIN in the open field and press **ENTER**.

It's important to note that vehicles manufactured prior to 1981 can have inconsistent VINs. In addition, VINs cannot uniquely identify the style even though the style information is present.

Some vehicles, especially trucks, have VINs that are missing style information. When the VIN does not fully match a style, a list of possible styles appears with an asterisk next to the description on the screen.

Cover Page

After selecting Make, Year, Model and Style (or one step after tying in a VIN) the working window becomes a Cover Page.

The Cover Page is the work center for the process, from the first view of a car to the time of resale. This process is made up of four distinct stages:

1. Valuation
2. Reconditioning
3. Purchase price
4. Stock card

The top half of the window is a summary of vehicle information and other data attached to this vehicle. Figure 42 is an example of the Cover Page.

The lower half of the screen contains four buttons, one for each of the major processes in the managing used vehicles.

Place the pointer on the button or use the arrow keys to highlight the desired function button. Click the mouse or press ENTER to select.

The screenshot shows a window titled 'Cover Page' with the following information:

- Year: 1992
- Make: Ford
- Model: Explorer 400
- Style: 4dr Ugon Edle Bamer
- Region: UC
- Base Wholesale: 8674
- Base Retail: 10140
- License Number: 01N
- Salesperson's Name: [Redacted]
- Appraiser's Name: [Redacted]

At the bottom, there are four buttons: RECONDITION, VALUATION, PURCHASE PRICE, and STOCK CARD. The VALUATION button is highlighted.

Figure 42. Cover Page

To finish a function press F2 to accept changes or ESC to cancel. You will be returned to the Cover Page.

When information is changed under a function and accepted, a checkmark will appear beside that function. This helps you track your steps through the process.

Valuation

When you pick Valuation from the Cover Page, a screen similar to Figure 43 will appear. Items on the Valuation screen help identify additions and deductions to the base vehicle in order to establish an estimate of its value.

The initial value is based on a ready-to-sell vehicle in average condition. Use the Reconditioning function to estimate costs for upgrading a vehicle to saleable condition.

Since mileage impacts price, enter a mileage amount prior making equipment selections. A default value of 15,000/year is automatically provided. Press ENTER to accept this value or type over the default number to enter your own value.

The screenshot shows a window titled 'Valuation' with the following information:

- Year: 1992
- Make: Ford
- Model: Explorer 400
- Style: 4dr Ugon Edle Bamer
- Region: UC
- Base Wholesale: 8674
- Base Retail: 10140
- License Number: 01N
- Salesperson's Name: [Redacted]
- Appraiser's Name: [Redacted]

At the bottom, there are four buttons: RECONDITION, VALUATION, PURCHASE PRICE, and STOCK CARD. The VALUATION button is highlighted.

Figure 43. Valuation Screen

The list of base equipment may not necessarily represent the typical configuration for the vehicle or the most popular configuration for the vehicle. It will, however, approximate the equipment present on the majority of the vehicles in its class.

To add or delete items, highlight the item and press ENTER.

Equipment Symbols

Some of the equipment symbols can look similar to symbols in the new vehicle module. However, the symbols carry a different meaning for used vehicles.

“☺” is used to indicate that this item is assumed to be part of the base vehicle. The value of this item is \$0.00 since it is already included in the base vehicle value.

“√” means that this item is selected in addition to base equipment and its value is added to the total.

“||” is used to indicate that this item was assumed to be part of the base vehicle, but has been taken off. The amount of the deduction to the base value is shown and included in the totals.

Custom Options

The Valuation can be adjusted by adding equipment that actually does increase the value of the vehicle.

Extra value added items can be included on the list by pressing **ALT+A** for the Actions menu and selecting Custom Options.

Reconditioning

After Valuation, all vehicle condition issues are handled as specific reconditioning estimates. You can consider potential or estimated costs needed to bring the car up to saleable condition.

To enhance objectivity when estimating vehicle condition, a separate line for each anticipated cost allows a more accurate picture of the resale value of the vehicle.

If you performed the Valuation function first, all values for mileage and equipment will be brought forward as the Estimated Value. Additional blank fields allow more details or customization for uncommon costs.

The Reconditioning screen will catalog all repair, mechanical damage or general refurbishment costs. Later these estimates can be compared to actual costs and can serve as a self-check for the estimating process.

Reconditioning is a prerequisite to the stocking-in process and can be used as part of the written documentation on vehicles.

If a stock card is prepared later, these figures are carried forward so that estimates and real costs can be compared.

From the buying standpoint, reconditioning estimates will reduce the value of the car to cover repair costs.

Stock Card

The Stock Card brings forward all valuation info and reconditioning estimates.

If the car is taken in on trade, or is bought at auction or from a broker, then you can use the Stock Card to keep a record of actual repair costs. This can function similar to a lot inventory tool.

Valuation and Reconditioning are done first so that values and estimates are brought forward.

Reconditioning estimates are brought forward and are listed at the far right. These figures are for reference to actual cost of repairs and cannot be altered.

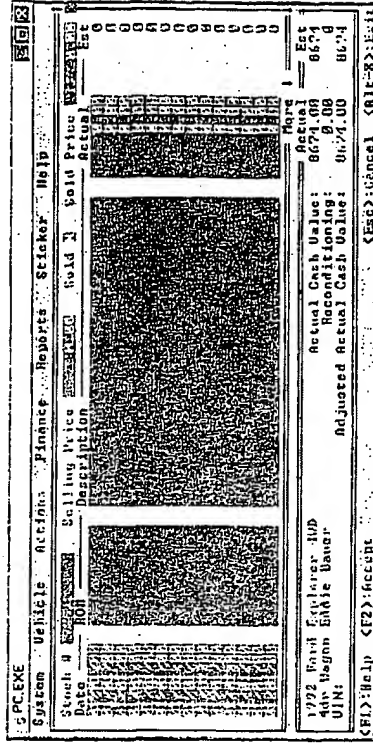


Figure 45. Stock Card Screen

The first field is open and requires the user to assign a stock or inventory number. A stock number must be assigned. You can return to the Cover Page without assigning a number by pressing ESC.

Enter information on the date of the reconditioning order, the R.O. number, description of the repair done, and actual costs for repair. Scroll down for more lines.

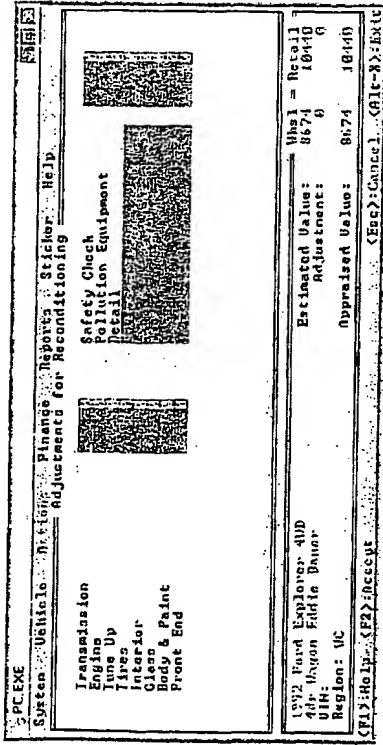


Figure 44. Reconditioning Screen

Purchasing Price

At some point the vehicle will be brought into inventory for resale. The price can be close to the appraised value, but the actual money out of the buyer's pocket can be different and needs to be tracked as a separate factor.

You can bring this figure forward to the stock card and finance screens at a later time.

Used Car Financing

Loan and Lease Windows

Loan and Lease worksheets in the Used Vehicle module work the same as they do in the New Vehicle module.

For a full description of Loan and Lease features see the Financing section. There are two slight differences between the New and Used financing.

Saving Loan and Lease defaults is done through the System menu by selecting Used Vehicle Settings and Save Settings. Secondly, you must supply your own used vehicle residuals, there are no captive residuals.

Assign Current Vehicle to a Worksheet

You can instruct the program to direct the current vehicle value to become either the Trade In value or the Selling Price value in both Loan and Lease screens.

The program defaults to bring the current vehicle's value into the Selling Price field. To assign the current value to the Trade In field, press ALT+A for Loan or Lease Action menu. Move the pointer to Make Current Vehicle and press ENTER.

The Get Trade In from Used option under the new vehicle Lease/Loan Action menus allows you to bring the used vehicle value into a financial worksheet.

Reports

Printing reports starts by pressing F10 for the Report Setup box. Several reports refer to specific used vehicle functions.

Figure 46. Report Setup Box, Used

Use the arrow keys to highlight the reports you want to print. Press ENTER to select. A checkmark will appear next to this selection. Only the reports marked with a checkmark will print.

Some items have a "➡" symbol on the right side of the window. This symbol indicates that additional report options can be selected or more information can be specified for that report. Press the **RIGHT ARROW** on the keyboard to go to an additional detail window.

Types of Used Vehicle Reports

Loan, Lease, and Prepared For are similar in layout and intention as the new vehicle module.

A Valuation report shows the base vehicle and equipment information, additional equipment and reconditioning estimates. This report is only available after Reconditioning has been done.

You can use the Inspection Form to communicate vehicle information in-house or as a tool to start the valuation process by filling out the form while looking over a car.

The Stock Card report prints a list of repair or refurbishment costs on a vehicle and can be used to create an inventory record.

A comprehensive list of Window Sticker Options is available to be printed. This report will print the complete list of window sticker items and can be helpful when evaluating a car, or when planning what items will make the window sticker a more potent marketing tool.

Any report setting can be saved as a default. See Saving Defaults in the Additional Features section.

Window Sticker

PC Carbook allows each user to make a customized sticker with a list of vehicle features.

PC Carbook
System Vehicle Options Finance Reports Help Close

Year 1992
Make Ford
Model Explorer 400
Style 400 Wagon Eddie Bauer

VIN
License Number
Salesperson's Name
Appraiser's Name

State
Est

EXTRA INTERIOR
EXTRA EXTERIOR
EXTRA WHEELS
EXTRA TIRE
EXTRA TIRE

Appraised Value 8674
Purchase Price 8671

Generate a new window sticker for the current vehicle.

Figure 47. Sticker menu

Create Sticker

Create Window Sticker brings forward information on company name, year/ make /model/style, VIN and Stock Number if already entered.

Five buttons for different components are selectable at the bottom of the screen and contain a list of equipment features.

Highlight the button for the desired component and press **ENTER** to select.

Once in the list, you can move the pointer up and down, selecting item to include on the window sticker. A checkmark will appear next to all selected items.

Press **F2** to accept the selected items, or press **ESC** to cancel selections.

Since the space on a window sticker is limited, only a fixed number of items can be included. A counter at the bottom of the screen keeps track of the number of items selected and the number of items left to fill remaining space.

Notice that some items can be pulled forward from the Valuation screen.

You can select these options from the Window Sticker list without affecting the retail price of the car.

In case you need to examine a vehicle before starting a window sticker, Window Sticker Options from the Report Setup menu will print a reference list of all 176 equipment items.

When finished with all components press **F2**. You can use the Edit Window Sticker option to re-enter the existing sticker and add vehicle features or change text information.

Users can choose to print both Suggested Retail prices and Selling prices, or no prices on the Window Sticker.

In the open field following Display Prices, type a **Y** if you want both prices to print, or type an **N** if you want no prices to print.

Print Sticker

Before printing, check the printer name in Printer Setup. A limited number of general printers are listed and can be selected to give enhanced print qualities.

Selecting the Print Window Sticker command from the Sticker menu will send the sticker info to your printer. Call Client Support if you encounter problems.

Additional Features

Save & Retrieve Log

All quotes can be saved and retrieved at a later date similar to the new vehicle CarSave feature. However, more information about the vehicle and customer is apparent as one scrolls through list of vehicles.

System	Update	Action	Finance	Reports	Sticker	Help
5 PC EXE				496		
Vocals	14	Update Cover Page	FU			
Make Po		Search by VIN	FE			
Model Ex		EXTRACT INFORMATION FROM REPORTS				
Style 40		Save data to Log	Alt-F3			
		Mark as sold				
Lic		Log Filters				
		Plush Vehicle				
Salesee						
Appra						

Engine	6 Cylinder
Transmization	Automatic
Region	UC
Estimated value (Wheel)	8674
Adjustment	0
Appraised Value	8674
Purchase Price	8674

4 RECOVERED VEHICLE

4 UNRECOVERED VEHICLE

4 UNRECOVERED VEHICLE

4 RECOVERED VEHICLE

Retrieve a previously saved vehicle from the log

Figure 48. Vehicle Menu

To save a quote, press **ALT+T+F3** or use the **Vehicle** menu. A box will appear on the screen that directs you to assign a file name to the quote. Press **F2** to accept the file name.

All used vehicle files are saved with the .USE extension.

Unlike new vehicle Carsave files, saved used vehicle valuations are “frozen” with the options and values done at the time the vehicle was saved.

You can view and print any retrieved vehicle. Attempting to change the value or options will result in the message, "You are about to delete the old valuation." You can choose to either continue with the changes or to cancel.

Log List

All quotes can be saved and retrieved at a later date. This can serve as a simple inventory tracking list. It is similar to the New Vehicle CarSave feature, but more information about the cars and their status are apparent as one scrolls through the list of vehicles.

GP/EXE
System Vehicle Actions Finance Reports Sticker Help
Cover Page

Year 1992
Model Explorer 400
Style 4dr Ugon Eddie Bauer
Date 02/23/90
Cover Price 8674.00
Purchase Price 8674.00

Engine 6 Cylinder
Transmission Automatic
Region NC

License Number
Salesperson's Name
Appraiser's Name

File Name: 01111.DSF
1992 Ford Explorer 400
4dr Ugon Eddie Bauer

Enter: Select (F4) Print (F5) Exit (F10) Help (F12) (Esc) Cancel

Figure 49. Log List

To use the log list, press ALT+V for the Vehicle menu and select Retrieve from Log or press ALT+F4. Use the arrow keys to scroll through the list. To select a vehicle, highlight the file and press ENTER.

As the highlight bar moves in the upper portion of the window, information in the summary box at the bottom of the screen will change.

To print the Log List, press F10 while viewing the Log List screen.

Log Filters

You can include or exclude vehicles on this list by selecting only the statuses that you wish to work with. Status remembers the last process worked upon.

The Log List will sort by one or all the functions (Valuation, Reconditioned, Purchased and Stock Card) as well as vehicles marked as sold.

GP/EXE
System Vehicle Actions Finance Reports Sticker Help
Cover Page

Year 1992
Model Explorer 400
Style 4dr Ugon Eddie Bauer

License Number
Salesperson's Name
Appraiser's Name

State
Use Log Filter
Reconditioned
Purchased
Stock Card
Sold

Actual Cash Value 8674.00
Adjustment 0.00
Final Cash Value 8674.00

Engine 6 Cylinder
Transmission Automatic
Region NC

Enter: Select (F4) Print (F5) Exit (F10) Help (F12) (Esc) Cancel

Figure 50. Set Log Filter dialog box.

Setting Region

The region will determine the base vehicle values and should be set to reflect your area. Setting region helps to fine-tune the used vehicle values according to your area.

To set the region, press ALT+S for the System menu, and then press S for Used Vehicle Settings.

Choose Set Region from the dialog box. Type the first few letters of the state you want to use and press ENTER.

GP/EXE
System Vehicle Actions Finance Reports Sticker Help
Cover Page

Year 1992
Model Explorer 400
Style 4dr Ugon Eddie Bauer

Select Region
WEST COAST
Alaska
Arizona
California
Florida
Illinois
Indiana
Iowa
Kentucky
Louisiana
Maine
Maryland
Massachusetts
Michigan
Minnesota
Mississippi
Missouri
Montana
Nebraska
Nevada
New Hampshire
New Jersey
New Mexico
New York
North Carolina
North Dakota
Ohio
Oklahoma
Oregon
Pennsylvania
Rhode Island
South Carolina
South Dakota
Tennessee
Texas
Utah
Vermont
Virginia
Washington
West Virginia
Wisconsin
Wyoming

Engine 6 Cylinder
Transmission Automatic
Region NC

Actual Cash Value 8674.00
Adjustment 0.00
Final Cash Value 8674.00

Enter: Select (F4) Print (F5) Exit (F10) Help (F12) (Esc) Cancel

Figure 51. Region Setting Box

Once you select a preferred region, save this setting as a system default. See Table A-2 in the Appendix for a chart of all regions.

Note: States are assigned according to areas (regions) that share similar valuation results, not by geography.

Appendix

Equipment Abbreviations

Whenever possible, PC Carbook spells out vehicle information in full. However, some common abbreviations are used for standard and optional equipment items that occur frequently or appear in areas of limited space.

To see a list of these abbreviations and their full meanings press F1 twice and select Abbreviations from Help Topics.

Terms Used In PC Carbook

Alt (Alternate)- A key used in combination with another key to execute a certain function, such as ALT+F2, (switch between Brief and Full Option descriptions).

Arrow keys- refers to the left, right, up, and down keys on the keyboard.

ASCII- (American Standard Code for Information Interchange) a code used in PC's to represent letters, numerals, and special characters.

Configured Vehicle Report- A printout of a complete vehicle which can include the standard equipment, optional equipment and financing.

Ctrl- (Control)- A key used in combination with another key to execute a certain function, such as Ctrl-F5 (Copy Column)

Dialog Box - A window that appears on screen whenever the program needs information from the user.

DOS- (Disk Operating System)- Operating systems are programs responsible for telling computers how to run other programs. DOS is an operating system for personal computers.

Effective Date- The effective date is the date that the manufacturers' price changes went into effect. Usually this date is from the price sheet. Although bulletins, notices, and order guides can modify ordering information and some prices, they cannot change the effective days.

Enter- A key used to transmit commands into the computer. Some keyboards label this key as Return.

Equipment Window- A window listing the optional or standard equipment available for a particular vehicle style.

Esc (Escape)- A key used to exit the window or pull-down menu in which you are currently working.

F1, F2, ... F10- Function keys programmed to execute certain functions, such as F10 (Print), and located either at the left end of or along the top of the keyboard.

Finance window- The window providing four columns for comparing loan or lease values on the same vehicle or different vehicles.

Help window- Quick reference windows, available from anywhere in the program, which contain useful notes on various aspects of the current function or window. Access by pressing the F1 (Help) key.

Logic- The ability for the program to "think" through the vehicle pricing rules rather than just list the data on the window for you to think through.

PgDn (Page Down)- A key used to go to the next page of a window.

PgUp (Page Up)- A key used to go to the previous page of a window.

Toggle- To alternately switch between two possible conditions.

PC Carbook Files

These files are created on the hard disk where specified during installation (normally in the \PC subdirectory):

ALG&3.RVL	Residualization file
MDDM.RES	Modem resource file
PC_STAT	Default settings
PC_CARBK.000	Data file index
PC.EXE	Dispatching program
PC.OVR	Program overlays
PCCB.EXE	New vehicle program
PCCBC.EXW	Install program
PCCB.HLP	Help file
PCCB.USR	Registration file
USED.EXE	Used vehicle program
USED.RES	Used vehicle data
*.CDS	Data file
*.CI	Consumer Info files

Removing Obsolete Data Files

About every nine months, you should remove obsolete PC Carbook data files from your hard disk. These files occur naturally and result from the monthly update process. This process does not affect any files you have created and saved.

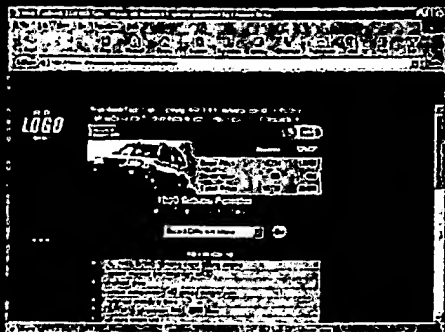
To remove obsolete data files, start the program with the /CLEAN command switch:

PC/CLEAN

If you have any questions about this step, call Client Support at :

1-800-937-3661

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Web Carbook is designed to be framed on your web site and contains no advertising or links to other web sites.

PC Carbook® on the Web!

Your consumers access Web Carbook through your web site, where they research and price their vehicle -- all from home. Your consumers will access the most accurate and comprehensive vehicle information available including; invoice and MSRP pricing, pictures, standard & optional equipment, technical specifications, warranty, road test, safety information, and more.

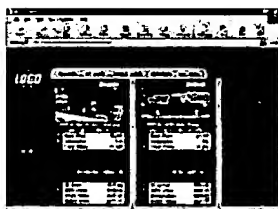
Providing vehicle information on your web site puts your organization at the point of sale to capture auto loan business!

For more information, visit:

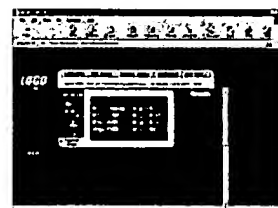
www.chrome.com or call **800-936-8904**

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Web Carbook Features:



Vehicle Comparison



Payment Search

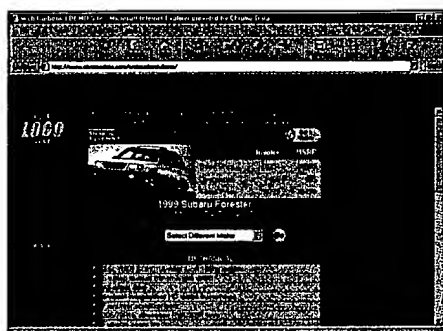
- **Make/Model Search:** Select based on Make, Model and Style.
- **Type Search:** Select based on vehicle type, drive train, price range, transmission, and year.
- **Payment Search:** Select based on vehicle type, down payment, dealer discount, term length, payment range, and year.
- **Vehicle Comparison:** Two vehicles are compared, side-by-side, feature-by-feature.
- **Main Vehicle Screen:** View standards, options, technical specifications, warranty, and rebates -- as well as road test and safety information.
- **Option Selection:** Web Carbook's option logic ensures your consumer has configured a complete vehicle.
- **Option Report:** Displays the options your consumer has selected in a printable format.
- **Get a Quote:** After your consumer clicks the "Get a Quote" button, they are prompted to fill out their contact information, rank options, and select interior and exterior colors.
- **Used Vehicles:** Web Carbook contains used vehicle data for the last ten years. View wholesale and retail values based on condition, mileage, and location.



Your consumers access Web Carbook through your web site, where they research and price their vehicle -- all from home. Your consumers will access the most accurate and comprehensive vehicle information available including; invoice and MSRP pricing, pictures, standard & optional equipment, technical specifications, warranty, road test, safety information, and more.

After your consumer selects their vehicle, they forward the vehicle file to your Chrome.com Quote Center™, for processing to dealers.

Your consumers can access the most accurate and timely vehicle information directly from your web site.



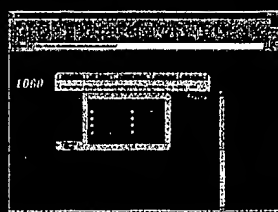
Web Carbook is designed to be framed on your web site and contains no advertising or links to other web sites.

Here's how Web Carbook works:

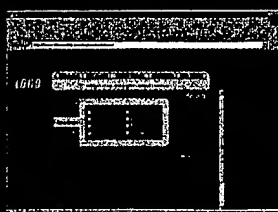
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**For more Information, visit: www.chrome.com
or call: 800-936-8904**

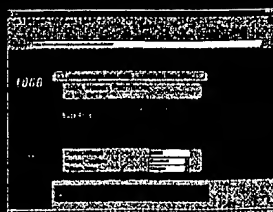
WEB CARBOOK FEATURES:



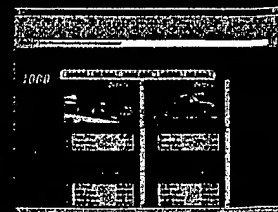
Payment Search



Type Search



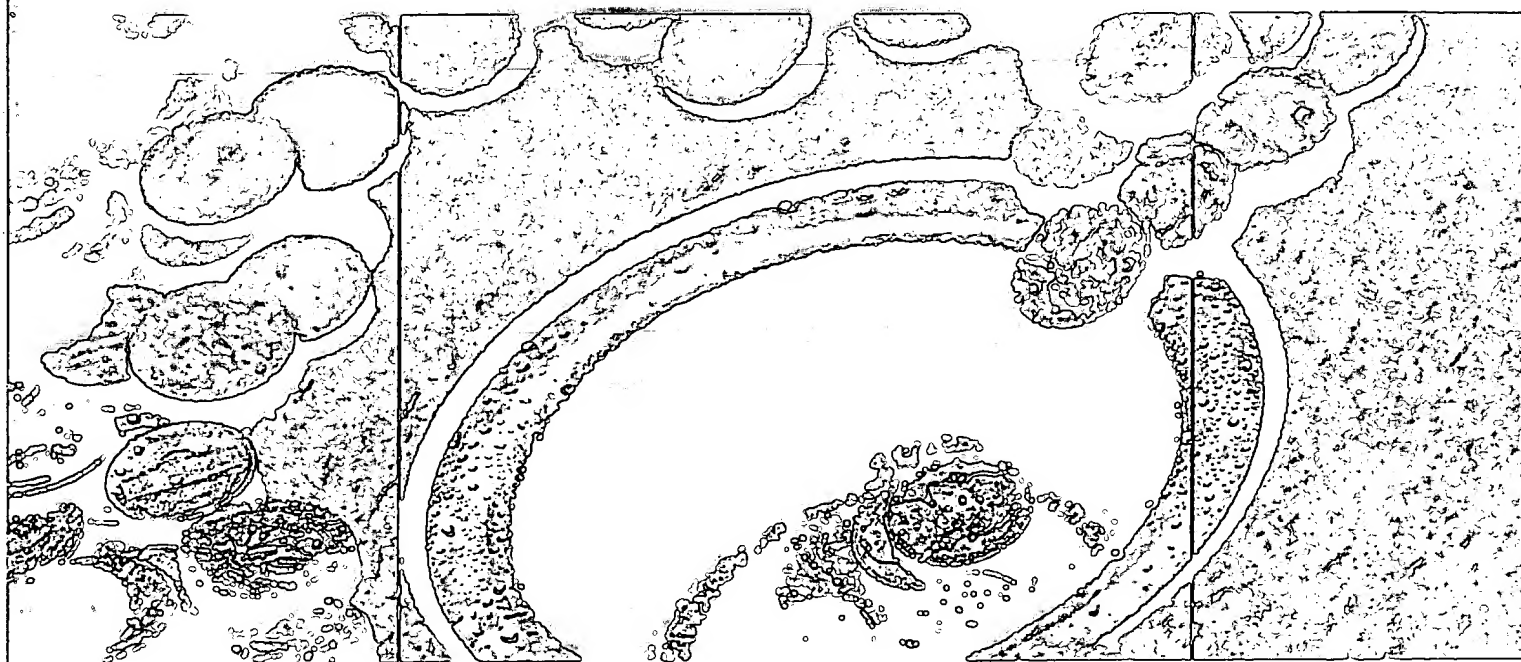
Used Vehicles



Vehicle Comparison

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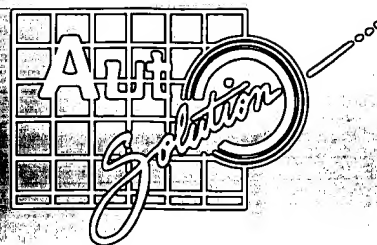
WEB CARBOOK



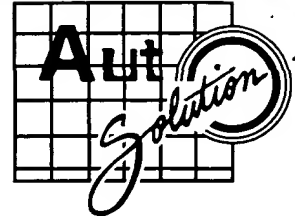
RECAPTURE AUTO LOAN BUSINESS WITH AUTO SOLUTION AND WEB CARBOOK

To capture your share of the business related to a new vehicle purchase, you need to be positioned squarely at the point of sale.

Web Carbook is the service that puts you there! It's the revolutionary Internet car market that connects with you and your buying service directly through your web site. Now you can be with Web Carbook and Auto Solution.



System Overview

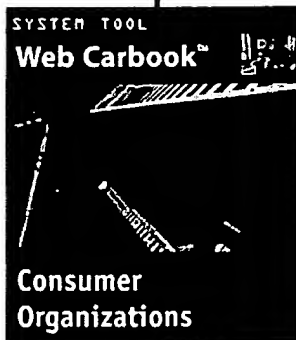


Use Web Carbook and Auto Solution to create a new auto-buying assistance program...



①

Members access Web Carbook through your Web Site to price and spec their new vehicle. This vehicle selection is then transmitted to Auto Solution and they assist your member on behalf of your credit union.



②

In their Quote Center, Auto Solution will receive an electronic notification and request form and prepare a quote based on the specifications outlined by your member.



③

Auto Solution contacts your member with the quote or quotes and the member in turn makes a decision on the vehicle.



④

Vehicle "closing" is arranged and Auto Solution faxes a purchase order directly to your loan department. You prepare check's and your member takes delivery of their new vehicle at their home or right at the Credit Union.



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